ASCENDER Business Release Notes

ASCENDER Business Release Notes

ASCENDER Release 7

ASCENDER 7.0700

Release Date: 3/03/23 **ASCENDER Update**: 7.0700

ASCENDER Homepage

❑ Corrected the Approval Summary dashboard to only display payroll approvals if the user has access to the pay frequency for a pending approval.

Finance > Maintenance > Create Chart of Accounts

❑ Corrected the program to allow accounts without account activity to be deleted. Previously, a message was displayed indicating that the account was being used in the general ledger history table and could not be deleted.

Finance > Maintenance > Postings > Check Processing - PA

❑ Corrected the program to prevent the computer check and reversal transaction from being marked for deletion (highlighted red) when changing a computer check to a district check.

Finance > Maintenance > Vendor Information > Vendor Misc - Copy from Payroll

❑ Corrected the functionality of the **Copy from Payroll** button. Previously, in certain scenarios, a program error could occur when adding a bank code to Finance.

Finance > Inquiry > GL Inquiry > GL Inquiry

❑ Added pagination to the JV detail pop-up window allowing users to view all accounts associated with the JV.

Finance > Inquiry > Vendor Inquiry

❑ Modified the program to retain the originator's user ID details on the original transaction. For example, if a user creates a PO/PA transaction and then another user voids, reverses, or deletes that transaction, the originator's user ID will remain associated with the original transaction and the user ID of the subsequent user will be associated with the subsequent transaction(s).

Finance > Inquiry > Travel Reimbursement

❑ Increased the size of the travel request details pop-up window (spyglass icon) to prevent scrollbars from being displayed.

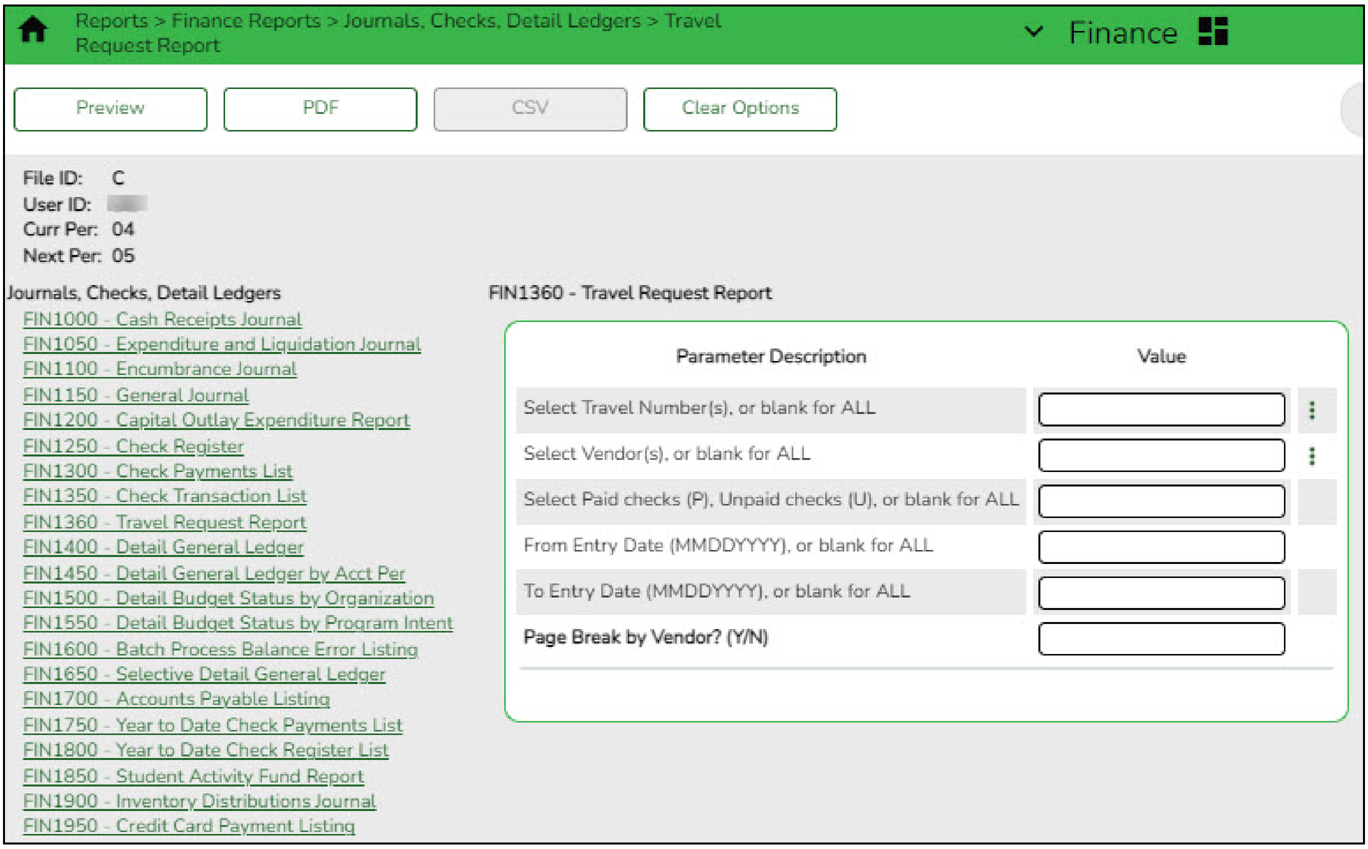
Finance > Utilities > Positive Pay Export

❑ Corrected the program error that occurred when clicking the **Print** button. This issue was caused by a bank account group with a blank **Bank Account Nbr** on the Bank Reconciliation > Tables > Bank Account Fund Groups tab.

❑ Corrected the program error that occurred when clicking the **Print** button. This issue was caused by a blank **Employer Offset Account** on the Payroll > Tables > Bank Codes > EFT tab.

Finance > Reports > Finance Reports > Journals, Checks, Detail Ledgers > FIN1360 - Travel Request Report

❑ Added this new report to provide a list of travel requests by vendor with all available travel details.



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

❏ Corrected out-of-balance issues that were caused by missing object codes. Also, added the missing object codes to prevent future out-of-balance issues.

Payroll > Maintenance > Staff Job/Pay Data > Deductions

❏ Modified the program to allow 30 or more deduction codes to be saved.

Payroll > Reports > User Created Reports

❏ Corrected the spelling of Contract in **Contract Balance** under **Job Information**.

Personnel > Maintenance > Staff Demo

❑ Modified the display of error messages on each tab to improve the user experience.

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

❑ Corrected the format of the value in box 17 Employer identification number (EIN) from XXX-XXXXXX to XX-XXXXXXX.

Purchasing > Maintenance > Approve Requisition

❑ Corrected the issue that prevented requisitions from being returned to the originator if the vendor number or account number was blank.

Warehouse > Maintenance

❑ Corrected the functionality of the **Uniform Acct Distr** button to retain the percent and/or amount entered upon clicking **+Add** to add a row.

- Create/Modify Warehouse Requisitions
- Create/Modify Inventory Restock Requisitions
- Approve Warehouse Requisitions
- Approve Inventory Restock Requisitions

CareerPortal

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

EmployeePortal

EmployeePortal

❏ Modified the size of the **Version** and **Host** display in Safari to prevent overlapping with other elements on a page.

❏ Modified the program to display the **Version** and **Host** information on all pages and expand/collapse with the main menu as applicable.

EmployeePortal > W-2

❏ Changed the email subject line for W2 electronic consent from “A MESSAGE FROM W2 ELECTRONIC CONSENT” to “A Message from W2 Electronic Consent” to prevent emails from being blocked by certain email security tools.

MemberPortal

MemberPortal > Budget Revision Request & Reimbursement Request

❏ Changed the date format in approval emails from MM/DD/YYYY to MM-DD-YYYY for consistency.

Prior Release Notes for ASCENDER 7

Update: 7.0420

ASCENDER 7.0420

Release Date: 1/13/2023 **ASCENDER Update**: 7.0420

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

❏ Modified the 1099-NEC and 1099-MISC forms to print the two-digit year in the **Calendar Year** field to satisfy the new “fill in the blank” format (20__) when the report is run with the **Print 1099 Form only (1), 1099 form including 1099 file (2), Non-preprinted Copy B and C (3)** parameter set to 1.

Note: The two-digit year is retrieved from the **Tax Year** parameter beginning with the 2022 tax year.

❏ Corrected the alignment issue when printing 1099-NEC forms (**Non-preprinted Copy B and C (3)**).

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

❏ Corrected the functionality of the **Consent for Terminated Employees? (Y/N)** parameter. Previously, if the report was run with the parameter set to N, W-2s were printed for all active employees with an electronic consent of Y. Now, the parameter is only used to filter terminated employees, not active employees.

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Update: 7.0415

ASCENDER 7.0415

Release Date: 1/5/2023 **ASCENDER Update**: 7.0415

Payroll > Reports > TRS Reports > HRS4150 - TRS On-Behalf Payment Journal

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

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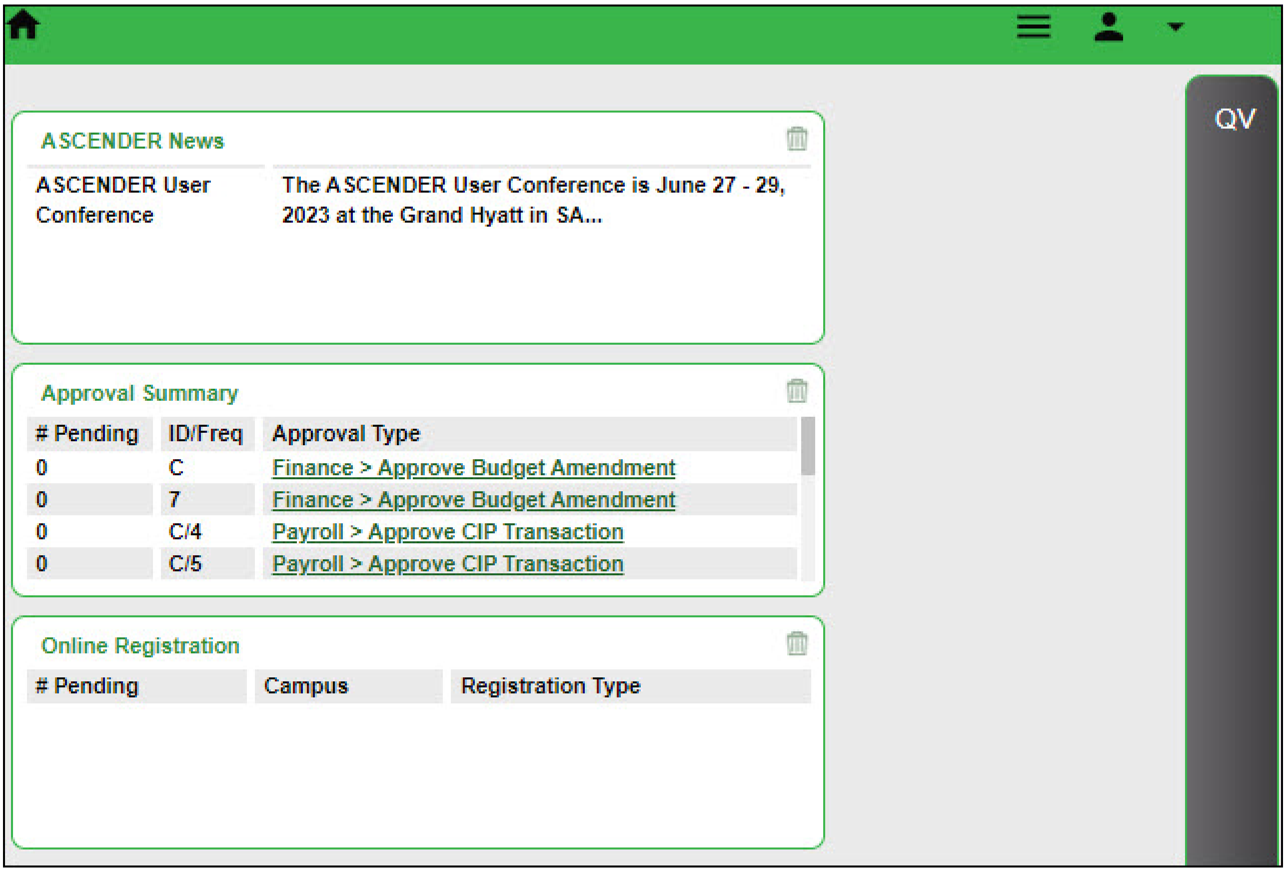
Update: 7.0400

ASCENDER 7.0400

Release Date: 12/14/22 **ASCENDER Update**: 7.0400

ASCENDER Homepage

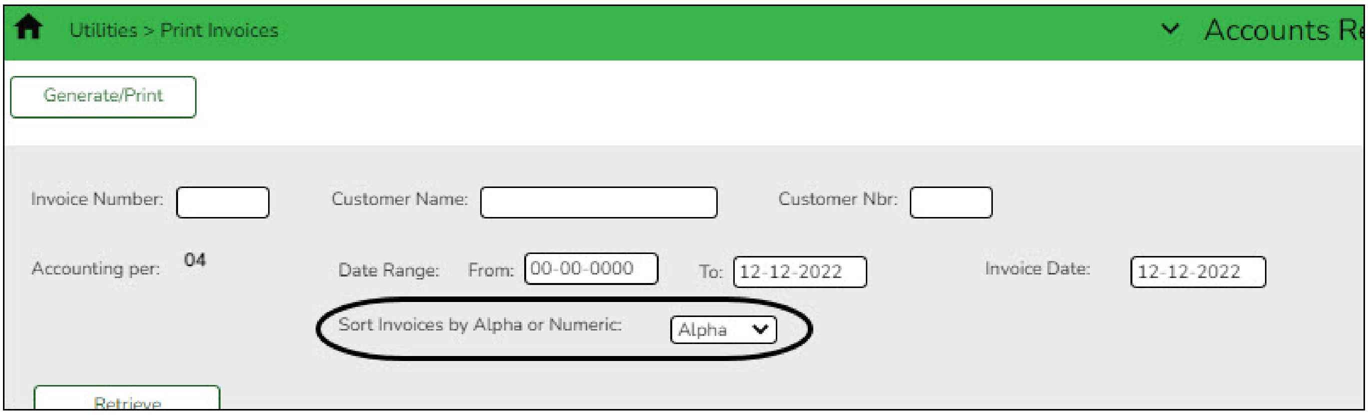
❑ Added the ASCENDER News dashboard element to display important announcements or upcoming events. Each dashboard element tile has the drag-and-drop feature enabled along with column x row layout options to allow the logged-on user to customize the layout of their dashboard elements. The user's selected layout preferences are automatically saved upon logging out of the software.



Accounts Receivable > Utilities > Print Invoices

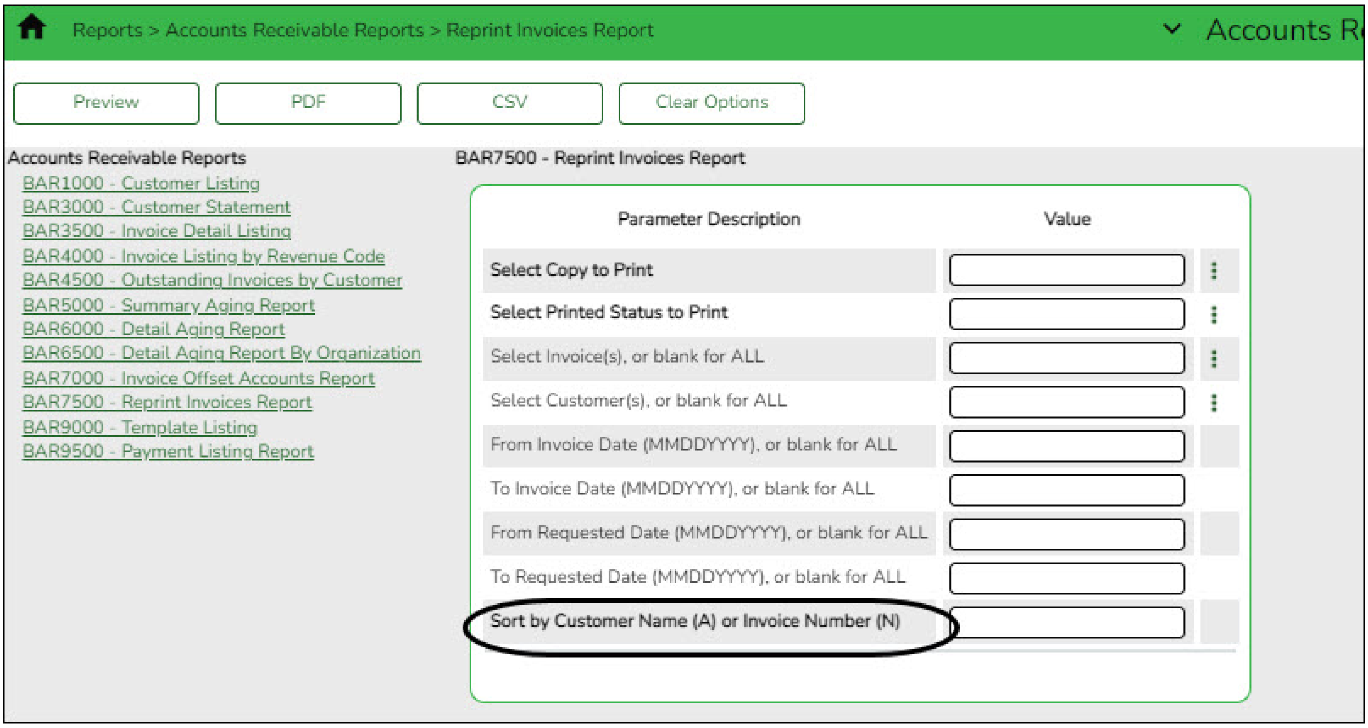
❑ Added the **Sort Invoices by Alpha or Numeric** drop-down field to select a sort order for printed invoices. The following options are available:

- **Alpha** - Sort invoices alphabetically by customer name.
- **Numeric** - Sort invoices numerically by invoice number.



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

❑ Added the **Sort by Customer Name (A) or Invoice Number (N)** parameter to select a sort order for printed invoices.



Budget > Maintenance > Budget Data

❏ Modified the program to allow an account with object code 8XXX to be added with any valid function code. Previously, accounts with object code 8XXX were restricted to a 00 function code.

Finance > Maintenance > Vendor Information > Vendor Misc - Copy from Payroll

❏ Modified the **Copy from Payroll** button functionality to compare the employee's bank information from Payroll to Finance, and automatically add the bank record to the Finance > Tables > Bank Codes > Bank Codes tab if it does not already exist. The bank record in Finance may be added with a different bank code than Payroll as it uses the next available bank code when adding the new record. Previously, if the bank information in Payroll did not exist in Finance, an error message was displayed prompting the user to manually add the bank information in Finance.

Finance > Maintenance > Create Chart of Accounts

❏ Modified the program to allow an account with object code 8XXX to be added with any valid function code. Previously, accounts with object code 8XXX were restricted to a 00 or 99 function code.

Finance > Maintenance > Postings

❏ Corrected the program to only display the **Documents** button after retrieving a valid record. Previously, the **Documents** button was displayed after clicking **Retrieve** even if a valid record was not retrieved.

- Journal Budget
- Purchase Order
- Cash Receipt
- Journal Actual

Finance > Maintenance > Postings > Check Processing-PO

❏ Corrected the trashcan icon to remain displayed on the page after changing the **Type** on a line item from *Computer* to *District*.

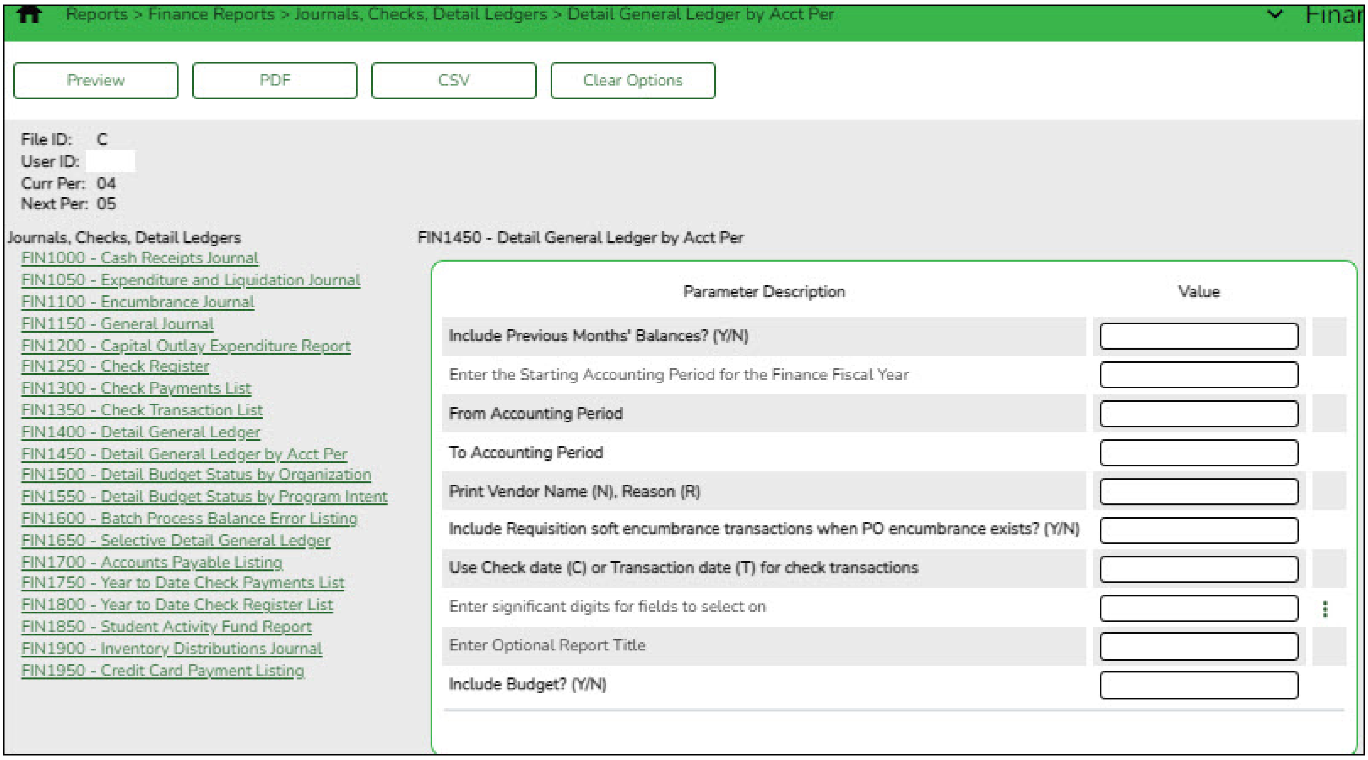
Finance > Maintenance > Pending Payables

❏ Corrected the program to maintain the **EFT** selection when processing payments. Previously, if **EFT** was selected for the vendor, the payment records did not maintain the **EFT** selection.

Finance > Reports > Finance Reports > Journals, Checks, Detail Ledgers > FIN1450 - Detail General Ledger by Acct Per

❑ Added the **Include Budget? (Y/N)** parameter with the following options:

- Y - Include all accounts
- N - Exclude 5XXX-8XXX accounts



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 2022 tax year.

Grants and Projects > Tables > Manage Users

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

Grants and Projects > Utilities > Copy Payment Dates

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

Payroll > Maintenance > Staff Job/Pay Data > Deductions

❑ Modified the program to display 15 rows in the grid instead of 10 before adding a scrollbar.

Payroll > Payroll Processing > Deduction Checks > Process Deduction Checks

❑ Modified the program to display the menu breadcrumbs on subsequent processing pages.

Payroll > Payroll Processing > Payroll Adjustments > Check Void

❑ Corrected the primary key error that occurred when voiding a check.

Payroll > Utilities > Transfer Transaction Processing > Process Transfer Checks

❑ Modified the program to display the menu breadcrumbs on subsequent processing pages.

Payroll > Reports > Payroll Reports > HRS2400 - Bank Account Listing

❑ Added the **Include SSN on Report? (Y/N)** parameter with the following options:

- Y - Include the employee's social security number on the report.
- N - Do not include the employee's social security number on the report.

Payroll > Reports > WorkJournal Reports

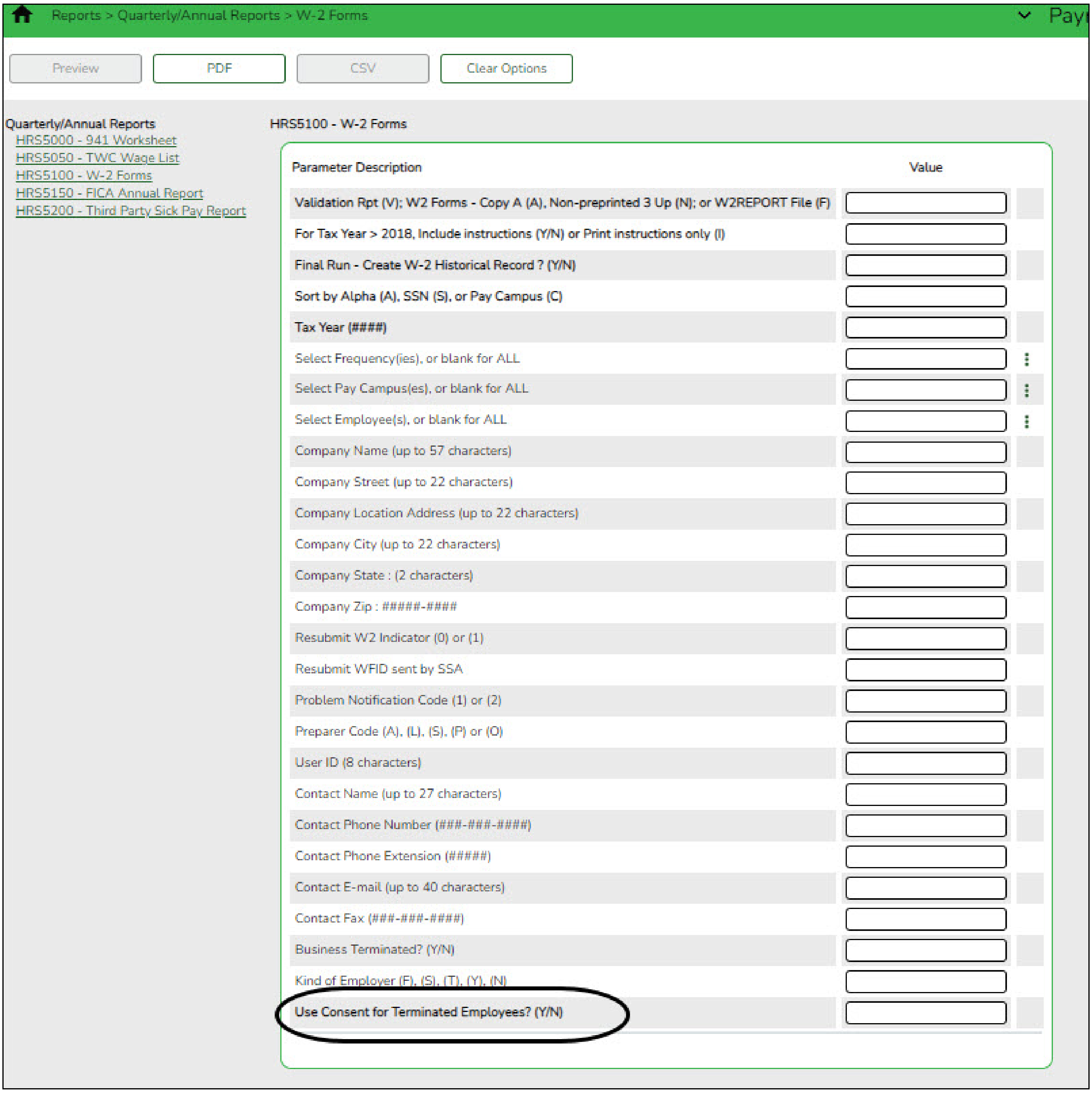
❑ Modified the reports to include leave total amounts in the **Total Hours** calculation and display the value in decimal format.

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 2022 tax year.

❑ Added the **Consent for Terminated Employees? (Y/N)** parameter with the following options:

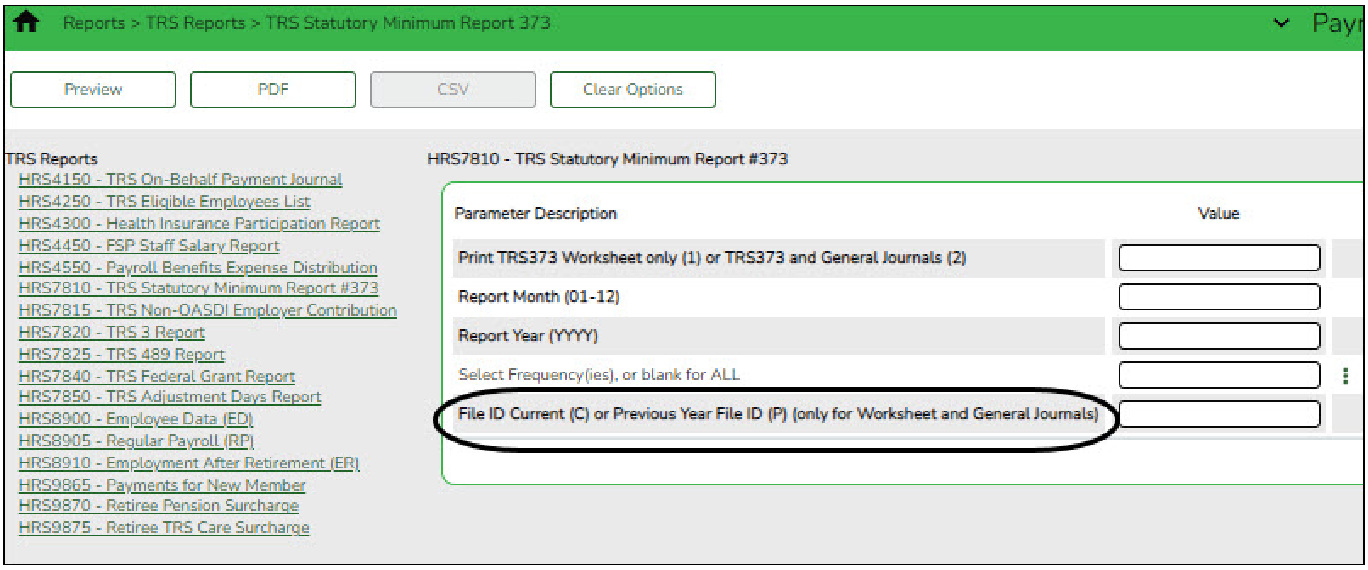
- Y - Use the W-2 electronic consent selection for each terminated employee (from EmployeePortal) to determine whether or not to print a W-2.
    - If the W-2 electronic consent is Y for a terminated employee, a W-2 is not printed.
    - If the W-2 electronic consent is N for a terminated employee, a W-2 is printed.
    - If the W-2 electronic consent is blank for a terminated employee, a W-2 is printed.
- N - Print W-2s for all terminated employees regardless of W-2 electronic consent selection.
    - If the W-2 electronic consent is blank for a terminated employee, a W-2 is not printed.



Payroll > Reports > TRS Reports

❑ Added the **File ID Current (C) or Previous Year File ID (P) (only for Worksheet and General Journals)** parameter to retrieve and calculate data for the current and previous year file IDs.

- HRS7810 - TRS Statutory Minimum Report 373
- HRS7815 - TRS Non-OASDI Employer Contribution



Personnel

❑ Updated the automated batch processing in Personnel. Instructions for this process are located on the TCC Technical Documentation > ASCENDER Personnel Import page in the ASCENDER Wiki.

Personnel > Maintenance > Employment Info

❑ Corrected the issue that prevented validation from occurring simultaneously for the **Auxiliary Role ID** and **Paraprofessional Certification** sections.

❑ Corrected the issue that prevented an **Auxiliary Role ID** from being completely deleted from all required tables.

❑ Corrected the issue that prevented the **Paraprofessional Certification End Date** from being properly saved to the employee's record.

Personnel > Maintenance > Staff Demo > Responsibility

❑ Modified the program to allow days and minutes weekly values to be saved for the following service IDs: PES00051 and PES00056. Previously, an error message was displayed.

Personnel > Utilities > Mass Delete > Employee Data

❑ Added the paraprofessional certification and auxiliary role ID data to the mass deletion process.

Personnel > Utilities > ACA 1094/1095 Correction/Replacement

❑ Per IRS requirements, updated the utility to support the 2022 tax year.

Personnel > Reports > Personnel Reports > HRS1550 - New Hire Report

❑ Renamed the output file from New_Hire_MMDDYYYY.txt to EINnhMMDDYYYY.txt where EIN is the **District Federal ID Number** on the Finance > Tables > District Finance Options > Finance Options tab, nh is new hire, and MMDDYYYY is the current system date.

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 2022 tax year.

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 2022 tax year.

Personnel > Reports > User Created Reports

❑ Corrected the **Employed Only** field to function as intended by including employees who are currently employed based on the current date, employment date, reemployment date, and term date.

Position Management

❑ Corrected the Employee Directory functionality. Previously, users could not select and retrieve records for employee numbers tied to employee names with an apostrophe.

Warehouse > Maintenance > Bid Processing > Request Vendor Quote

❏ Corrected the program error that occurred when selecting a bid from this page.

Warehouse > Maintenance > Bid Processing > Vendor Response

❏ Corrected the issue that prevented some **Bid Nbrs** from displaying after retrieving a bid.

Warehouse > Reports > Warehouse Reports > BWH1450 - Print Purchase Order Form

❏ Corrected the program error that occurred when printing individual purchase orders.

CareerPortal

CareerPortal

❏ Added the Document Attachments functionality to view and download documents (e.g., resumes) that were uploaded during the application process.

- Core Questions
- Profile
- Application
- Search Applicant

CareerPortal > Help

❏ Corrected the **Help** button to function as intended.

EmployeePortal

EmployeePortal > Help

❏ Corrected the program to display all appropriate Help content in Spanish when selected.

EmployeePortal > Inquiry > W-2 Information

❏ Per IRS requirements, updated the W-2 form/instructions and all W-2 functionality to support the 2022 tax year.

❏ Removed the following Families First Coronavirus Response Act (FFCRA) fields for the 2022 tax year and beyond as it is now obsolete.

> **Note**: These fields will still be displayed for the 2020 and 2021 calendar years.

- **EPSL1**
- **EPSL1**
- **EFMLEA**

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 2022 tax year.

EmployeePortal > Travel Reimbursement Requests > Travel Requests

❏ Modified the **Purpose** field to only allow letters, numbers, commas, periods, and dashes.

MemberPortal

MemberPortal > Grant List

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

Update: 7.0300

ASCENDER 7.0300

Release Date: 11/3/2022 **ASCENDER Update**: 7.0300

ASCENDER > Homepage

❑ Increased the 60-minute session timer on the homepage (Main Menu) to 300 minutes.

Update: 7.0200

ASCENDER 7.0200

Release Date: 10/18/2022 **ASCENDER Update**: 7.0200

Finance > Maintenance > Vendor Information > Vendor Miscellaneous

❑ Corrected the **Copy from Payroll** functionality to copy the complete bank account number from Payroll instead of only the last four digits.

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

❏ Corrected the **Exclude Days for TEA** checkbox to default to 0 (not selected) instead of 1 (selected) when adding a new job record.

Payroll > Reports > Year To Date Reports > HRS3500 - YTD Wage and Earning Statements

❏ Corrected the **E-mail** functionality to only include the year-to-date statements that coincide with the dates entered in the **From Pay Date (MMDDYYYY), or blank for ALL** and **To Pay Date (MMDDYYYY), or blank for ALL** parameters. Previously, all year-to-date statements for an employee were included.

Personnel > Maintenance > Staff Demo > Responsibility

❏ Removed the validation that required the **Begin Date**, **Staff Service**, and **Monthly Minutes** to be entered if the **Role ID/Staff Classification** was selected.

Personnel > Maintenance > Employment Info

❏ Removed the Paraprofessional Certification records that were erroneously created for employees without a certification.

❏ Removed all validations related to the **Estimated Annual Salary (Hourly Employees Only)** section as it is now obsolete.

Update: 7.0100

ASCENDER 7.0100

Release Date: 9/30/2022 **ASCENDER Update**: 7.0100

ASCENDER > Homepage

❑ Added a 60-minute session timer to the homepage (Main Menu). This timer redirects the user to the ASCENDER Login page and requires them to log on again if they attempt to launch an application after being inactive on the homepage for more than 60 minutes.

Note: This timer is separate from the individual application session timers that are set up in District Administration.

❑ Per the 2022 National Automated Clearing House Association (Nacha) Operating Rules & Guidelines, modified the program to store an encrypted version of bank account and employer offset account values in the database. The encrypted values are decrypted via a stored procedure allowing the entire value to be displayed for viewing, editing, and/or approval purposes on the following pages. Also, modified reports to display only the last four digits of the bank account number.

- Bank Reconciliation > Tables > Bank Account Fund Groups > Bank Account Group
- Finance > Tables > Bank Codes > EFT
- Finance > Maintenance > Vendor Information > Vendor Miscellaneous
- Finance > Maintenance > EFT Processing
- Finance > Utilities > Export Finance Tables
- Finance > Utilities > Import Finance Tables
- Finance > Utilities > Positive Pay Export
- Grants and Projects > Tables > SSA Members > Bank Code
- Grants and Projects > Utilities > Grant Payments > Create EFT File
- Payroll > Tables > Bank Codes > EFT
- Payroll > Maintenance > Staff Job/Pay Data > Pay Info
- Payroll > Payroll Processing > Run Payroll
- Payroll > Payroll Processing > EFT Processing
- Payroll > Self-Service > Payroll Approval
- Payroll > Self-Service > Pending by Alternate
- Payroll > Next Year > Copy CYR Staff to NYR
  - Added the **Bank Acct Nbr Enc** column to the Copy and Delete Bank Deposit reports.
- Payroll > Next Year > Copy NYR Staff to CYR
  - Added the **Bank Acct Nbr Enc** column to the Copy and Delete Bank Deposit reports.
- Payroll > Utilities > Payroll Simulation > Pay Info
- Payroll > Utilities > Positive Pay Export
- Payroll > Reports > Payroll Reports > HRS2400 - Bank Account Listing
- EmployeePortal > Self-Service

Accounts Receivable > Maintenance > Create/Modify Invoice

❑ Added validation to allow all valid accounts (except 4XXX accounts) in Finance file ID C to be displayed in the **Account Code** drop-down. As a result, removed the validation restricting the drop-down to only 5XXX and 7XXX accounts.

> **Note**: These changes are also effective on the Accounts Receivable > Maintenance > Invoice Voids/Adjustments, Create/Modify Template, and Credit Memo pages.

❏ Modified the program to default the account codes using the new account code fields on the District Administration > Maintenance > User Profiles > Permissions page. If the District Administration fields are blank, then the **Offset Obj** and **Offset Sobj** fields default to the values in the **Accounts Receivable** field on the Finance > Tables > District Finance Options > Clearing Fund Maintenance tab and the **Offset Org** field is set to 000.

Accounts Receivable > Maintenance > Invoice Payments > Payments

❏ Corrected the **Date Range** parameter to use the invoice date instead of the entry date when retrieving invoices.

Accounts Receivable > Utilities > Import Invoices

❏ Added the following fields to the import as they are also included on the Accounts Receivable > Maintenance > Create/Modify Invoice page.

- **Reference**
- **Due Date**
- **Quantity**
- **Unit of Issue**
- **Product Type**
- **Unit Price**

Asset Management > Maintenance > Inventory Maintenance

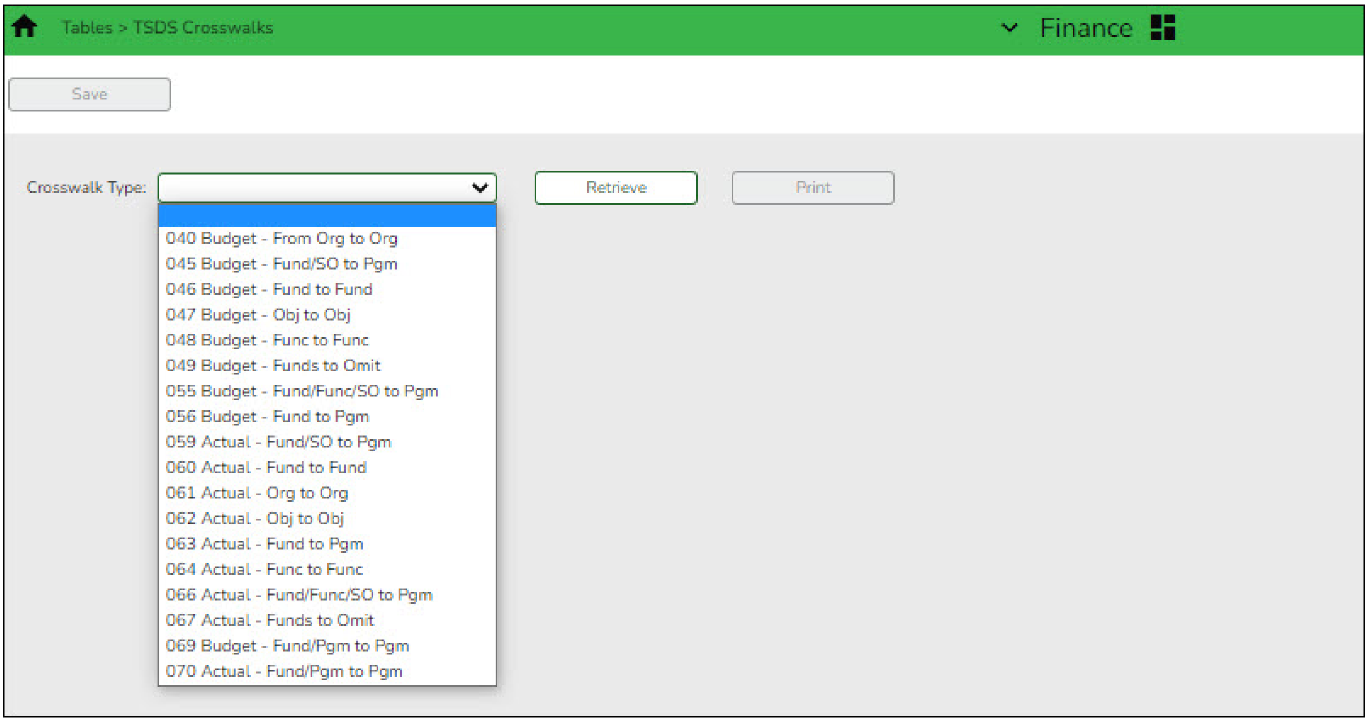
❏ Corrected the pagination functionality in the Directory to display all available pages when performing a search by **Property Class**. Previously, the pagination feature only displayed the first page of the search results.

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

❑ Modified the program to allow prior year invoices to be processed regardless of the year in which they originated. Previously, an error message was displayed.

Finance > Tables > TSDS Crosswalks

❑ Added this new page to map financial data (actual and budget) from the LEA's set of accounts to TEA's Chart of Accounts.



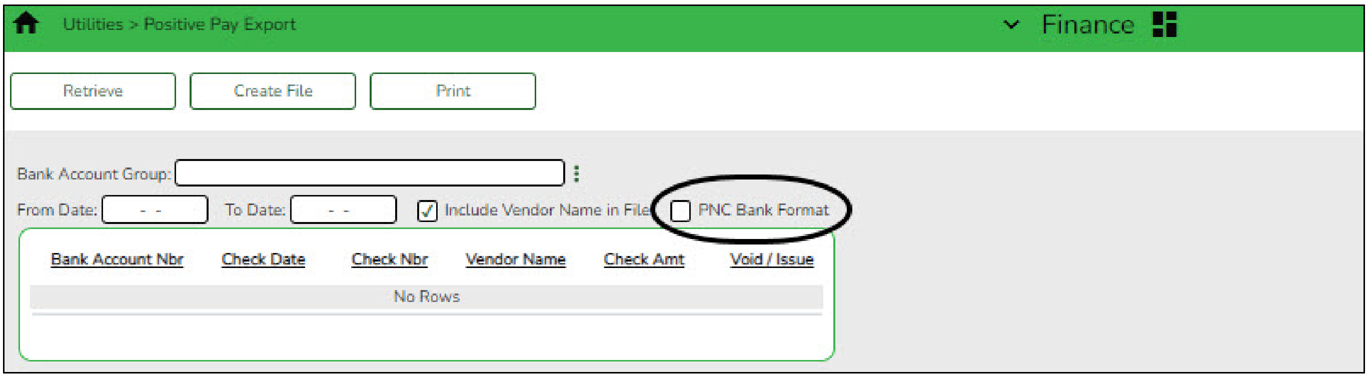
Finance > Inquiry > Travel Reimbursement Inquiry

❑ Corrected the issue that prevented the travel request pop-up window from being displayed when clicking the **Details** spyglass icon.

❑ Changed the **Travel req Nbr** column heading to **Travel Req Nbr**.

Finance > Utilities > Positive Pay Export

❑ Added the **PNC Bank Format** checkbox to generate a file in a layout that meets the PNC Bank format guidelines. When **PNC Bank Format** is selected, a fixed-width file is generated with a file name of PNCpositive_MMDDYYYY.txt. Also, added the new PNC Bank Pay File Layout to the Interfaces page: PNC Bank Positive Pay File Layout



Finance > Reports > Finance Reports > Journals, Checks, Detail Ledgers > FIN1250 - Check Register

❑ Removed the **Include Void Test Patterns? (Y/N)** parameter as it is now obsolete and should no longer be used.

Finance > Reports > Finance Reports > Journals, Checks, Detail Ledgers > FIN1800 - Year-to-Date Check Register List

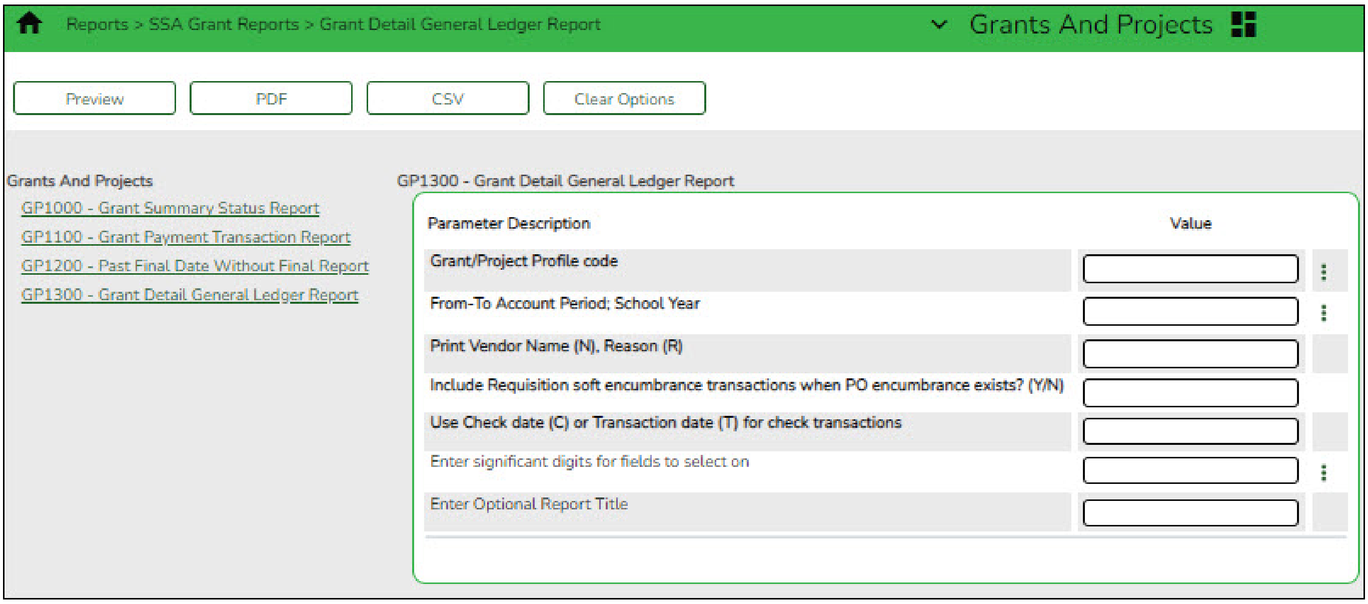
❑ Removed the **Include Void Test Patterns? (Y/N)** parameter as it is now obsolete and should no longer be used.

Grants and Projects > Tables > Grant/Project Profile

❑ Corrected the program to prevent a grant/project code from being deleted if it is assigned to a user on the District Administration > Maintenance > User Profiles > Grants and Projects page.

Grants and Projects > Reports > SSA Grant Reports > GP1300 - Grant Detail General Ledger Report

❑ Added this new report to provide a list of detailed transactions from the general ledger for a specified grant code. Users can view grant/project data for the entire grant period regardless of the school year or file ID, or retrieve data based on the school year, file ID, and from/to accounting periods.



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

❑ Added the **Exclude Days for TEA** checkbox (under **Calendar/Local Info**) to exclude the number of days employed (for the selected job) from TEA reporting. For example, this field would be used for an employee who performs two separate jobs on the same day. Also, renamed the **Calendar/Local Options** field to **Calendar Cd**.

Note: These changes are also effective on the Payroll > Utilities > Payroll Simulation > Job Info tab.

Payroll > Maintenance > Approve CIP Transaction

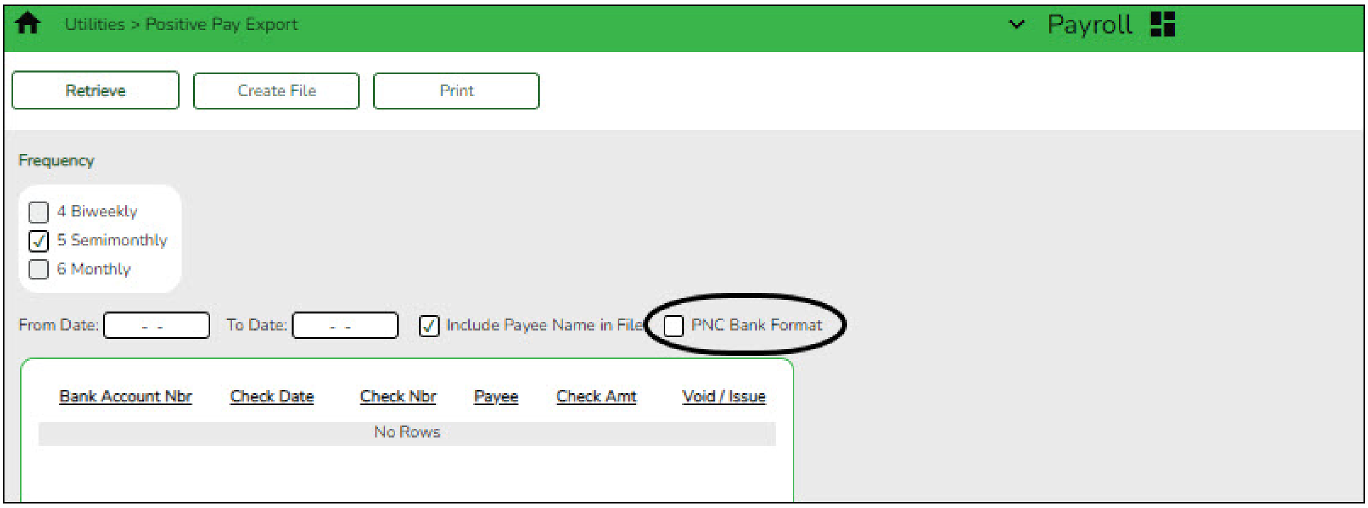
❑ Added the **Exclude Days for TEA** checkbox to exclude the number of days employed (for the selected job) from TEA reporting. This field is read-only and displays the selection from the Change in Position transaction.

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

❑ Modified the program to include the Exclude Days for TEA and datetimestamp columns in the copy process.

Payroll > Utilities > Positive Pay Export

❑ Added the **PNC Bank Format** checkbox to generate a file in a layout that meets the PNC Bank format guidelines. When **PNC Bank Format** is selected, a fixed-width file is generated with a file name of PNCpositive_MMDDYYYY.txt. Also, added the new PNC Bank Pay File Layout to the Interfaces page: PNC Bank Positive Pay File Layout



Payroll > Reports

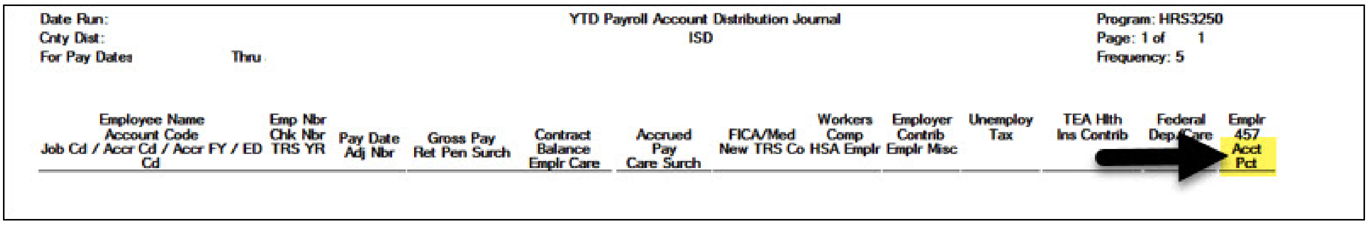
❑ Removed the **Print Bank Account Number? (Y/N)** and/or the **Include Bank Information? (Y/N)** parameters from the following reports as they are now obsolete and should no longer be used. Now, a masked version (last four digits) of the bank account number is always displayed on the reports.

- HRS1650 - Employee Salary Information
- HRS2500 - Wage and Earning Statement
- HRS3500 - YTD Wage and Earning Statements

Note: These changes are also effective for the reports in Personnel.

Payroll > Reports > Year To Date Reports > HRS3250 - YTD Account Distribution Journal

❑ Added the **Account Pct** column to the report to display the percentage of the payroll distribution account.



Payroll > Reports > Quarterly Annual Reports > HRS5050 - TWC Wage List

❑ Disabled the **PDF** and **CSV** buttons. Previously, a program error occurred when clicking the **PDF** or **CSV** buttons to generate the report.

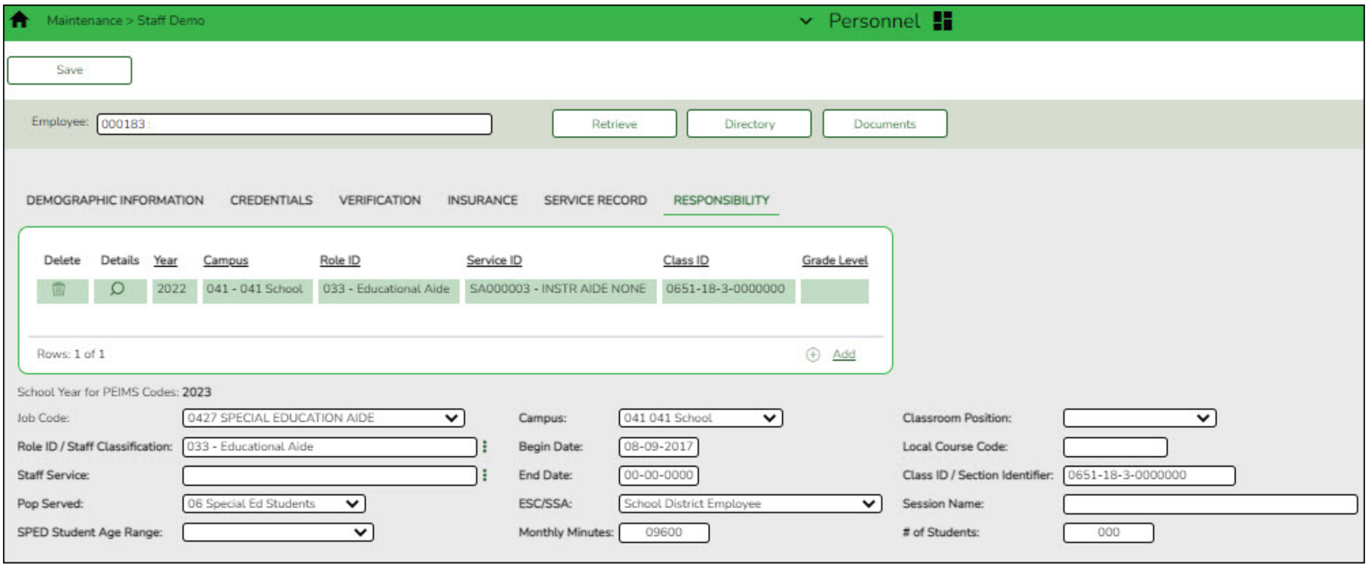
Personnel > Maintenance > Staff Demo > Responsibility

❑ Modified the program to display responsibility records for the current PEIMS year (**School Year for PEIMS Codes**) and the current PEIMS year (**School Year for PEIMS Codes**) minus one.

❑ Added the trashcan icon to the grid to allow responsibility records to be deleted.

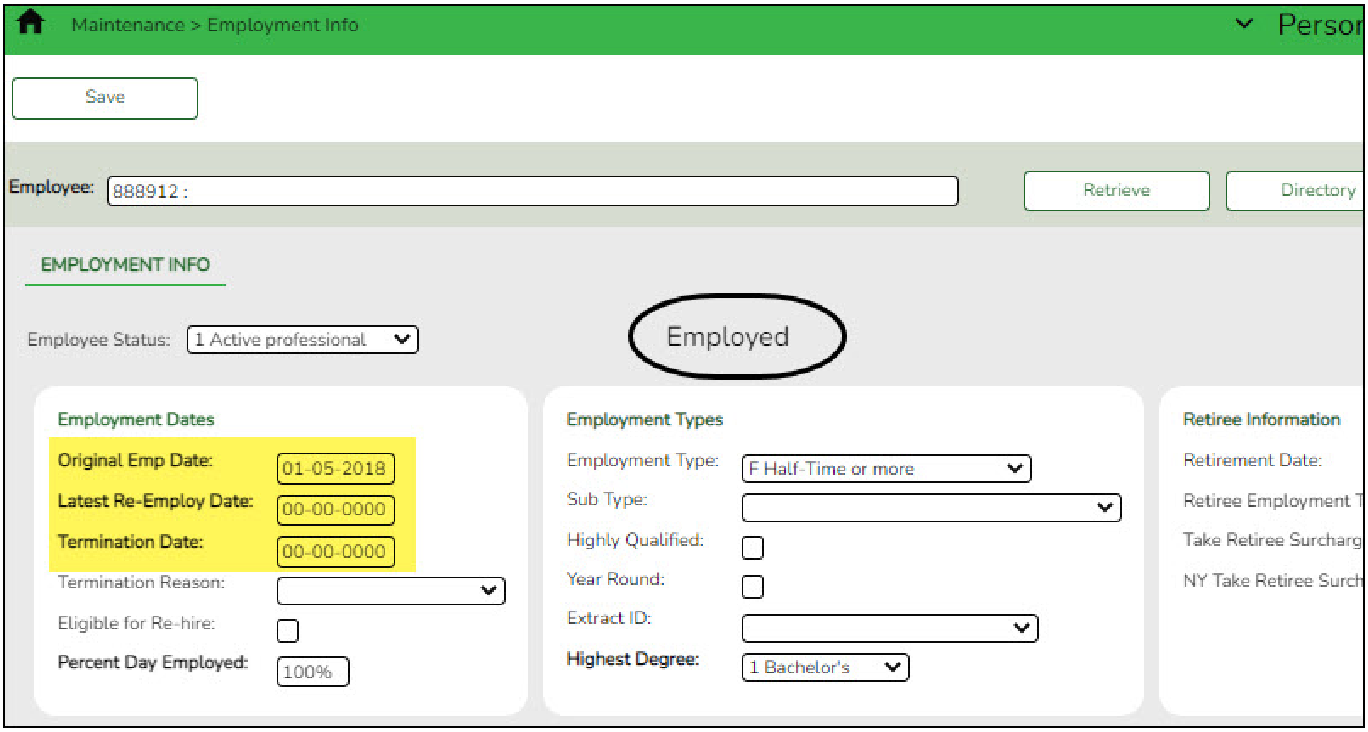
❑ Restructured the page to accommodate various field updates and additions to be used for state reporting purposes. The fields in the first and second columns are used for reporting on non-instructional employees. The fields in the second and third columns are used for instructional employees.

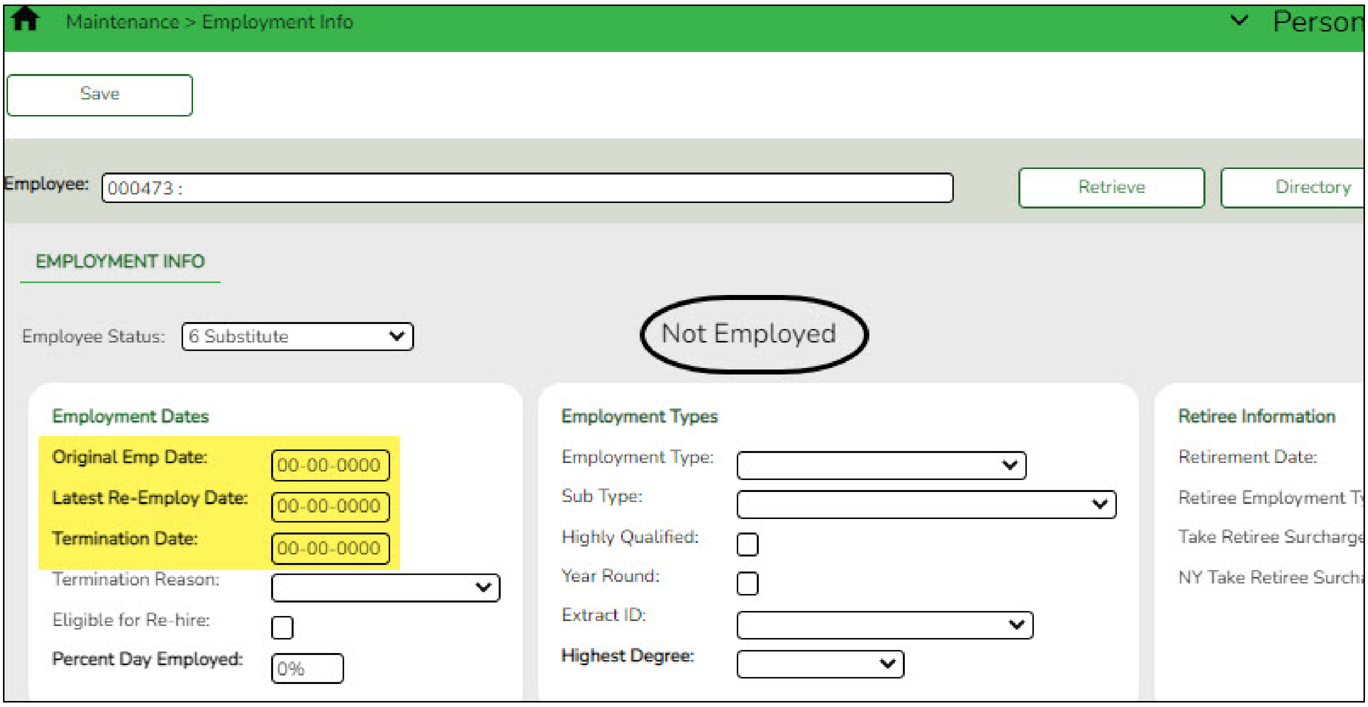
- Added the **Staff Classification** label to the **Role ID** field to accommodate TSDS' new naming conventions.
- Added the **Staff Service** field to indicate the services supplied by non-instructional employees.
- Added the **SPED Student Age Range** field.
- Added the **Classroom Position** field to indicate the type of position the employee holds in the specific class/section.
- Added the **Local Course Code** field to indicate the local code assigned by the LEA that identifies the course offering provided for the instruction of students.
- Added the **Section Identifier** label to the **Class ID** field to accommodate TSDS' new naming conventions.
- Added the **Session Name** field.



Personnel > Maintenance > Employment Info

❏ Added the employment status indicator. After retrieving an employee record, the employee's current employment status (**Employed**/**Not Employed**) is displayed next to the **Employee Status** field. The **Employed**/**Not Employed** status is based on the current system date and the employee's **Original Emp Date**, **Latest Re-Employ Date**, and **Termination Date**. If changes are made that affect the current employment status, the updated employment status is displayed upon saving the record.





❑ Restructured the page to accommodate various field updates for state reporting purposes.

❑ Added the **Employment Dates** section with the following fields:

- **Original Emp Date**
- **Latest Re-Employ Date**
- **Termination Date** (previously named **Date** under the now removed **Termination** section)
- **Termination Reason** (previously named **Reason** under the now removed **Termination** section)
- **Eligible for Re-hire**
- **Percent Day Employed**

❑ Added the **Employment Types** section with the following fields:

- **Employment Type**
- **Sub Type**
- **Highly Qualified**
- **Year Round**
- **Extract ID**
- **Highest Degree**

❑ Added the **Retiree Information** section with the following fields:

- **Retirement Date**
- **Retiree Employment Type**
- **Take Retiree Surcharge**
- **NY Take Retiree Surcharge**

❑ Added the **Electronic Consent** section with the following fields:

- **W-2** (previously named **W-2 Elec Consent**)
- **1095** (previously named **1095 Elec Consent**)

❑ Added the **Service Record** section with the following fields:

- **Full Semester** (previously under the now removed **Termination** section)
- **Grades Taught** (previously under the now removed **Grade(s) Taught** section)

❑ Added the **ERS Retiree Health** section with the following fields:

- **Current Year Elig** (previously named **ERS Retiree Health Elig**)
- **Next Year Elig** (previously named **NY ERS Retiree Health Elig**)

❑ Added the **Auxiliary Role ID** section with the following fields:

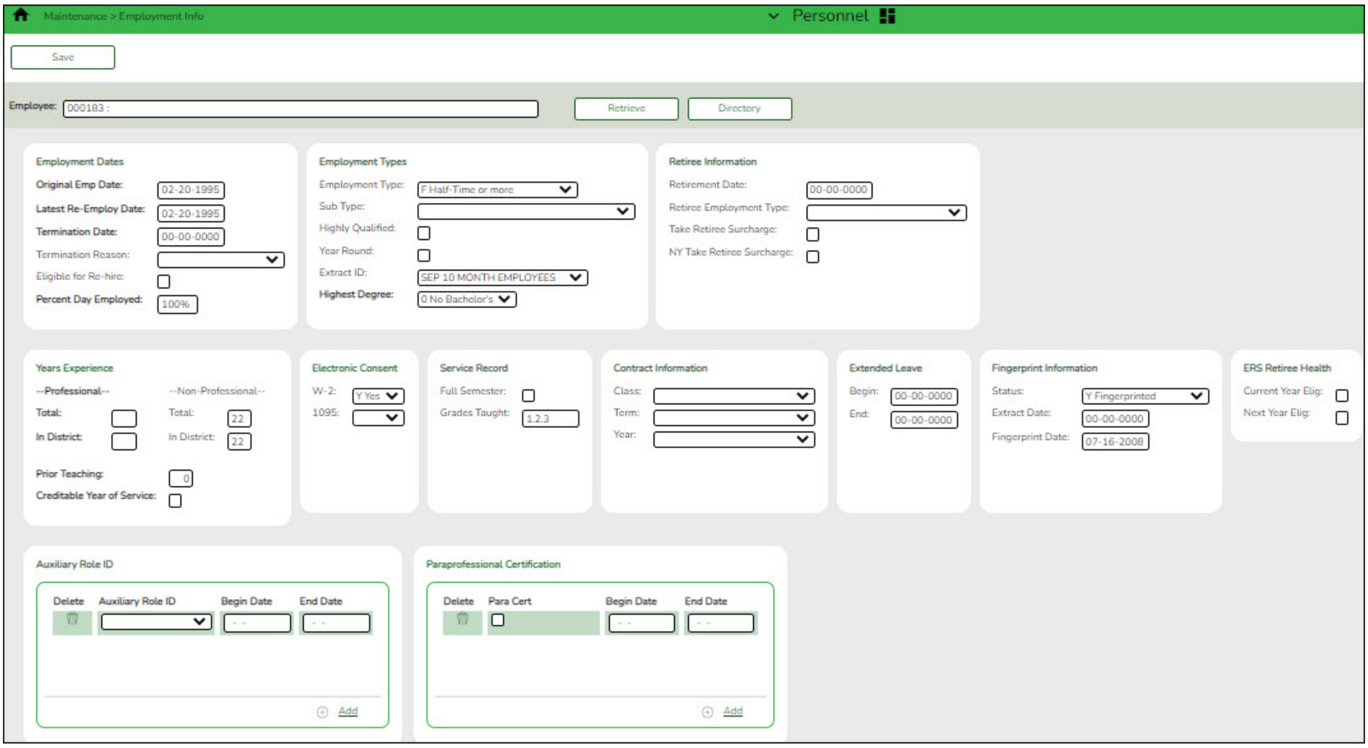
- **Auxiliary Role ID**
- **Begin Date** (replaced the now removed **Effective Date** fields)
- **End Date** (replaced the now removed **Effective Date** fields)

❑ Added the **Paraprofessional Certification** section with the following fields:

- **Para Cert**
- **Begin Date**
- **End Date**

❑ Removed the **Estimated Annual Salary (Hourly Employees Only)** section. For hourly employees, use the Payroll > Maintenance > Staff Job/Pay Data > Job Info tab to update contract totals with a zero balance for reporting purposes.

❑ Removed the **Unemployment Eligibility** section. Use the Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab to update unemployment eligibility.



Position Management > Maintenance

❑ Added the **Exclude Days for TEA** checkbox to exclude the number of days employed (for the selected job) from TEA reporting. For example, this field would be used for an employee who performs two separate jobs on the same day.

- PMIS Position Admin > Position Record
- PMIS Position Modify > Position Record
- PMIS Position History > History > Position Record (spyglass pop-up window)
- PMIS Change in Position > Change in Compensation
- PMIS Change in Position > Non-Comp Funding Changes
- PMIS Change in Position > Non-Comp Position Changes
- PMIS Change in Position > Separation
- PMIS Forecast Change

Note: The **Exclude Days for TEA** checkbox was also added to the CIP Reports.

Position Management > Utilities

❑ Modified the following processes to include the Exclude Days for TEA column.

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

Warehouse > Maintenance > Fill Back Orders

❑ Corrected the **Detail** spyglass icon pop-up window to display and function as intended. Previously, the pop-up window was blank.

CareerPortal

CareerPortal > Homepage

❑ Modified the program as follows since the portal no longer supports the mobile responsive functionality.

- Removed the blue banner with the following statement: “CAREERPORTAL IS OPTIMIZED TO WORK ON MULTIPLE PLATFORMS. DESKTOP & MOBILE.”
- Removed the “mobile friendly design” label along with the images of the tablet and cell phone.

CareerPortal > Login

❑ Corrected the program to allow a SuperAdmin user to log on even if they are an external user not assigned to an LEA.

CareerPortal > Job Details

❑ Corrected various user interface issues to improve the user experience. Also, changed the page name from Position Details to Job Details.

CareerPortal > Applicant Detail

❑ Corrected the program to display all questions from the application even if the applicant did not answer all questions.

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

❑ Added the **Position Details** accordion section to view the details of the job for which the selected applicant has applied.

CareerPortal > District Settings (Co-op)

❑ Corrected the program to allow a new co-op to be saved with or without entering an email domain. Previously, if an email domain was entered when adding a co-op, the record was not saved.

CareerPortal > Admin Tools > User Management

❑ Corrected the program to allow Admin-only users to edit the Users and User/Group Link pages.

Back Cover