



**ASCENDER**®  
ELEVATING TECHNOLOGY SOLUTIONS

**ASCENDER 6.0400**

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# ASCENDER 6.0400

**Release Date: 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

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## 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.

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## 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.

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

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**PO**

- Corrected the trashcan icon to remain displayed when adding a new line item.
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**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.
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**Finance > Inquiry > GL Inquiry > GL Inquiry**

- Corrected transaction and balance issues within the spyglass pop-up window.
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**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.
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**Finance > Utilities > Out of Balance Correction**

- Corrected the program to prevent incorrect balances to be calculated and saved.
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**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.
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## 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.

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## 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.

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## 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.

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## Grants and Projects > Maintenance > Approval Dashboard

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

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## 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.

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## Payroll > Maintenance > Calendar YTD Data > Calendar YTD

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

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

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- **EFMLEA**
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## **Payroll > Maintenance > Calendar YTD Data > W2 Inquiry**

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

- **EPSLA Regular**
  - **EPSLA Two-Thirds**
  - **EFMLEA**
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## **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.

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## **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.

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## **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.

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## **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.

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## **Payroll > Reports**

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

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- 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.

The screenshot shows a web interface for 'Reports > User Created Reports' under the 'Payroll' category. At the top, there are buttons for 'Save', 'Create Report', 'Delete', and 'Reset'. Below these are several sections of checkboxes for report configuration:

- Personal Information:** Middle Name, Last Name, Generation, Sex, DOB, City, State, Zip, Zip+4, Addr Country, Former Last Name, Former Generation, Driver's License, DL State, DL Expir Date, Bus Ext, Cell Area Cd, Cell Phone Nbr, Local Restriction, Public Restriction, Local Use 1, Local Use 2, Email, Home Email, Employee Notes, Emer Phone Nbr, Emer Ext, Pacific Islander, White.
- Certification:** Cert Type, Date Expire, Specialty Area, Teaching Spec.
- Responsibility:** Campus, Role ID, Service ID, Pop Served, Nbr Of Students, Monthly Minutes, Class ID, Class Type, ESC/SSA, Job Code, Days Wk 1, Days Wk 2, Days Wk 3, Days Wk 4, Min Wk 1, Min Wk 2, Min Wk 3, Min Wk 4, Grade Level.
- Employment:** Employee Status Code, Highest Degree Achieved, Percent Day Employed, Est Annual Salary, Yrs Professional Experience, Yrs Professional in District, Yrs Prior Teaching, Yrs Non-Professional Experience, Yrs Non-Professional in District, **Creditable Year of Service** (highlighted with a red circle), Contract Class, Contract Term, Contract Year, Grades Taught, Original Emp Date, Latest Re-Employ Date, Retirement Date, Termination Date, Extended Leave Begin, Extended Leave End, Take Retiree Surcharge, NY Take Retiree Surcharge, Extract ID, Fingerprint Status, Fingerprint Extract Date, Fingerprint Date, W-2 Elec Consent, 1095 Elec Consent, ERS Retiree Health Elig, NY ERS Retiree Health Elig, Employment Type, Retiree Employment Type, Termination Reason, Termination Reason Descr, Full Semester, PEIMS Auxiliary Role ID, Highly Qualified, Paraprofessional Certification.

## 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*

The screenshot shows the 'Maintenance > Staff Demo' interface. The 'CREDENTIALS' tab is active. The 'Education' section contains a table with columns: Delete, College, Year, Major, Minor, and Degree. The 'Teacher Incentive Allotment Designation' section is highlighted with a red circle and contains a table with columns: Delete and Allotment Code. The Allotment Code dropdown menu is open, showing three options: '01 Active National Board Certified Teacher', '02 Active Teacher Incentive Allotment Designation', and '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.

The screenshot shows the 'Utilities > Mass Update' interface. At the top, there is a breadcrumb trail: 'Utilities > Mass Update' and a dropdown menu for 'Personnel'. Below this is a 'Parameters' section with various fields: 'Pay Status' (radio buttons for Active, Inactive, Both), 'Pay Type', 'Job Code', 'Accrual Code', 'Pay Grade', 'Prior Yr Emp Date', 'Primary Campus', 'Payoff Date', 'Pay Campus', 'Frequency', 'Contract Begin Date', 'Salary Concept', 'Contract End Date', 'Extract ID', 'Contract Months', and 'Employee Nbr'. Below the parameters is an 'EMPLOYEE' section with three main areas: 'Reset', 'Update Experience', and 'Modify'. The 'Reset' area contains several checkboxes and dropdowns, with the 'Creditable Year of Service' field (set to 'Yes') circled in red. The 'Update Experience' area has checkboxes for 'Total (Prof) Experience', 'District (Prof) Experience', 'District (Non-Prof) Experience', and 'Total (Non-Prof) Experience', each with an 'Increment' dropdown and an 'If Employment Date <' field. The 'Modify' area has 'Area Code' and 'Zip Code' fields, each with 'From' and 'To' sub-fields.

### 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.

The screenshot shows the configuration page for the HRS1750 - Teacher Incentive Allotment Designation Report. At the top, there is a breadcrumb trail: Reports > Personnel Reports > Teacher Incentive Allotment Designation Report. Below this, there are four buttons: Preview, PDF, CSV, and Clear Options. On the left side, there is a list of Personnel Reports, with HRS1750 - Teacher Incentive Allotment Designation Report highlighted in yellow. On the right side, there is a table for configuring the report parameters.

Parameter Description	Value
Sort by Alpha (A), Pay Campus (C), Primary Campus (P)	<input type="text"/>
Pay Status Active (A), Inactive (I), or blank for ALL	<input type="text"/>
Pay Type 1-4, Exclude Subs (E), or blank for ALL	<input type="text"/>
Select Pay Campus(es), or blank for ALL	<input type="text"/>
Select Primary Campus(es), or blank for ALL	<input type="text"/>
Select Employee(s), or blank for ALL	<input type="text"/>
Select Frequency	<input type="text"/>

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

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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.

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### **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.

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### **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)
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### **Personnel > Reports > User Created Reports > Personnel**

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

Reports > User Created Reports Personnel

Save Create Report Delete Reset

Report Template

Public Retrieve Directory

Report Title

Employee Nbr:   Active Employees Only

**Employment**

<input type="checkbox"/> Employee Status Code	<input type="checkbox"/> Yrs Non-Professional Experience	<input type="checkbox"/> Original Emp Date	<input type="checkbox"/> Take Retiree Surcharge	<input type="checkbox"/> W-2 Elec Consent	<input type="checkbox"/> Termination Reason
<input type="checkbox"/> Highest Degree Achieved	<input type="checkbox"/> Yrs Non-Professional in District	<input type="checkbox"/> Latest Re-Employ Date	<input type="checkbox"/> NY Take Retiree Surcharge	<input type="checkbox"/> 1095 Elec Consent	<input type="checkbox"/> Termination Reason Descr
<input type="checkbox"/> Percent Day Employed	<input checked="" type="checkbox"/> Creditable Year of Service	<input type="checkbox"/> Retirement Date	<input type="checkbox"/> Extract ID	<input type="checkbox"/> ERS Retiree Health Elig	<input type="checkbox"/> Full Semester
<input type="checkbox"/> Est Annual Salary	<input type="checkbox"/> Contract Class	<input type="checkbox"/> Termination Date	<input type="checkbox"/> Fingerprint Status	<input type="checkbox"/> NY ERS Retiree Health Elig	<input type="checkbox"/> PEIMS Auxiliary Role ID
<input type="checkbox"/> Yrs Professional Experience	<input type="checkbox"/> Contract Term	<input type="checkbox"/> Extended Leave Begin	<input type="checkbox"/> Fingerprint Extract Date	<input type="checkbox"/> Employment Type	<input type="checkbox"/> Highly Qualified
<input type="checkbox"/> Yrs Professional in District	<input type="checkbox"/> Contract Year	<input type="checkbox"/> Extended Leave End	<input type="checkbox"/> Fingerprint Date	<input type="checkbox"/> Retiree Employment Type	<input type="checkbox"/> Paraprofessional Certification
<input type="checkbox"/> Yrs Prior Teaching	<input type="checkbox"/> Grades Taught				

## 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 &

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## BWH1500 - Reprint Purchase Order Form

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

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# EmployeePortal

**Release Date: ASCENDER Update: 6.0400**

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

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

- **EPSSL1** (Emergency Paid Sick Leave Act (EPSLA) regular rate)
- **EPSSL2** (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.

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## 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.

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## 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.

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## 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.

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## 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.

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## 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.

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# MemberPortal

**Release Date: ASCENDER Update: 6.0400**

- Modified the program to ensure that the applicable Employee/Supervisor reminder emails are sent daily around 6:00 AM.
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## MemberPortal > Login

- Corrected the Oops error page to display MemberPortal instead of EmployeePortal.
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## MemberPortal > Forgot Password

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



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## **Back Cover**