Harris School Solutions has an issue tracking system, named AHA, to monitor program enhancements and defects. The numbers refer to the issues in AHA that were resolved in this release.

To submit an idea for product enhancements/improvements, click here.

Release webinar & technical documents

Issues marked with an asterisk (*) are included in a Release Webinar. Issues with TWO asterisks (**) are included in the Release Webinar AND a technical document is available on Team Support and in the online help.

Click the **Play recording** link below to open the webinar. Registration with your name & email address is required, but no password is required.

Play recording (29 min)

New Feature

- **AptaFund Timekeeping:**
  - Allows export of Salary Job information to AptaFund Timekeeping by checking the AptaTime checkbox in Master Position Detail. AFD-12
  - Import hours for Salary jobs from AptaFund Timekeeping. This shows salary hours on the AptaFund Timekeeping Import popup. AFD-32
  - AptaFund Timekeeping – will now prevent users from deleting designations in Master Positions when they still exist in Employee Jobs. An error message pops up if the user tries to delete an active designation which will list all the employees that have that designation in Employee Jobs. AFD-44
- ****Budget Requisitions > Budget Management:** The Propose Account Budget button has been replaced with the Edit button. The Edit button now displays a popup with the Budget Item Details grid at the bottom of Edit Budget Item Popup. The new grid will display the Detail Line, Amount, Description and Comment. AFD-47 & 48
- **My AptaFund > Employee Self-Service > My Deductions:** ESS/W-4 - Allow Printing only of Approved Forms on my Deductions. APTA-1562
- **Payroll > Reports:** Added a field labelled 'Exclude Additional State and Federal Withholding' to the Payroll Register payments and Payroll Register by Paycheck reports. AFD-36

Improvements

- ***Dashboard > My Deduction Change Request Approvals:** Approvers now can print one or more W4s once they have been approved. Can also print W4 from Deduction Assignment. APTA-1693
- **Federal/State Specific**
  - ***2022 Changes 1099-MISC and 1099-NEC:** Changes have been made in Vendor Management and Reports to reflect the 2022 form changes for Copy B. APTAFUND-2919

- **1099-MISC form changes:** Form name replace with Year, added revision date, account number field moved to bottom of form, FATCA filing requirement box now Box 13.
- **1099-NEC form changes:** Form name replace with Year and added revision date.

- o ***Colorado Dec Staff Report changes:**
  - Added Measures of Student Learning for Teacher, Principal and for SSP.   The Evaluation Criteria 'Teacher Quality Standard 6' was added to Evaluation Criteria Group 'Teacher', 'SSP Measures of Student Outcome' was added for Special Services Providers and the 'Principal Quality Standard 7' was added for the Principals. These new codes can be used when filling out the Measures of Student Outcomes. APTAFUND-3107
  - Layout changes for CDE Dec Staff report include the removal of the field 'Passed Parapro Test' from the 'Staff Profile' grid and the 'Staff Profile' export. Two spaces were added at the end of the 'Staff Profile' export file. The total length of the file is now 180. APTAFUND-3108

- o ***Colorado DR0004 form:** Added DR0004 to the W-4 images for 'State W-4' for CO. Changed the State Withholding settings for Colorado on the deduction set to match the form. Integrated the new setting with the Symmetry tax engine for proper calculation. APTA-1950

- o ***Maine > ME PERS Report:** PERS reportable retired employees with the Personnel Status code of 53 are now reporting on PSERS ESS Reporting Report and Export. APTAFUND-3102

- o ***Nebraska > NPERS Report:** Include Hours imported from AptaFund Timekeeping for Salary Jobs. APTA-1967

- o ***Virginia > Payroll Register Payment Report/VRS Hybrid Plan Contribution ICMA Report:** The formula for the VRS Deduction calculation has changed. If the VRS Report Month field on the employee's job is blank, AptaFund will divide the VRS Annual Salary by the job's pay periods. If it is a number, then AptaFund will divide the VRS Annual Salary by that number. APTAFUND-2939

- o **W-4s 2022 Updates:** The Federal W-4 and W4 for AZ, CA, HI, ME, NE and OR were updated with 2022 changes. APTA-2067

- **Human Resources > Contract Types:** Cleanup of the Configuration Entry was done that affected some areas such as HR > Master Position screen, HR > Manage Employees, HR > Employee Jobs, HR > Employee Jobs with Allocation where Contract Type can be from Employee Contract Type only or blank. Administration > Data Import > Employee Management > Master Position, Employee Listing Contract Report shows the new Employee Contract Types plus options All and None. AFD-7

- ***Leave > Leave Requests:** There has been a new field/column added to handle multiple leave requests by one employee, causing their balance to go negative. This new field is called "Available to Request" and will show the number of hours/days available, including requests that are submitted but not yet approved. This new field has been added to My Leave Requests, My Leave Balances, HR>Manage Employee, HR>Leave>Leave Balances and HR>Leave>Leave Details. APTA-2046

- ***Leave > Leave Details:** Changed the Leave Details screen to be multi-tab – Details tab and Requests tab. On the Requests tab, the Request number is a hyperlink that will open the Leave Request. The Employee Substitute Report has been moved to the Requests tab (under the blue gear) and will not be listed on the Details tab anymore. APTA-1694

- ==**Leave > Manage Leave:**== Created a Balance Cap field for leave types. This new field is in the Edit Leave Type pop-up on the Group Leave Types tab. The new Balance Cap can either be entered directly into the Edit Group Leave Type pop-up, where it applies to all members of the group, or it can be entered into the years-of service schedule. APTA-2891
- **My AptaFund > My Dashboard & Employee Self-Service:** Added My W-2 Consent Elections menu option. APTA-1469
- ==*==**Payroll > Manage Payroll > Payroll Register:** A new field 'Exclude Additional State/Federal Withholding' has been added to the Payroll Register and to the grids Manage Payroll and Employee Paycheck Deductions. APTA-1789
- **Reports:**
    - **A/R Module:** The following reports were moved to the A/R Module with A/R permissions: APTAFUND-3053
        - Billing Item Listing
        - Bill Schedules
        - Pending Item Validation/Error Report
        - Pending Item Verification Report
        - Posted Item Verification Report
        - Print Invoices/Credit Memos
    - ==*==**W-2:** If an employee has a termination date in the same year as the tax year for which the W-2 is being printed, then AptaFund will print that W-2 even if the user has elected to receive an electronic copy only. APTA-360
    - **W-2 and 1099 Copy A**: These forms will print on the appropriate pre-printed stock that can be purchased through Harris Forms. APTAFUND-3122
- **SSO Single Sign-On:** Technical Document is now provided for the Support for Google Workspace. APTAFUND-3104

Bugs Fixed

- **Admin > Importing > Data Import:** Modified "Bank Account Reconciliation – Cleared Checks" import to raise an error if a check number is used more than once. APTA-2216
- **Leave > Leave Balances:** Corrected the processing and messages when using the Delete button on Leave Adjustment transactions. This was changed to execute for Taken transaction types only rather than all types of leave transactions and the message has been changed to read: "Are you sure you want to delete the selected transaction(s)? Any posted transaction(s) will instead be cancelled with a new transaction."   APTA-2088
- **Human Resources > Employee Jobs:** Payroll Job Comment, even when empty, was overwriting the HR Job Comment. This issue has been corrected. APTA-2191
- **ME PERS Export:** The report has been corrected to now include the contributions to Grant deductions. APTAFUND-3126

New & Revised Topics in the Online Help

Revised topics

Release Notes & Tech Notes page - corrected links to Jun10, 2022 and March 4, 2022 Release Notes.

My AptaFund > My Deductions – New Federal/State W-4: added SIGN button for Signature.

HR, Payroll & ESS > Payroll > Deduction Change Requests – approvers have a W-4 print option.

My AptaFund > My Dashboard > My Deduction Change Request Approvals – print option added for approvers ie. Payroll Manager.

Budget & G/L > Budget > Budget Management > Edit Budget Amounts – Added step 6 Budget Item Details grid with new screenshots.

My AptaFund > User > My Dashboard - added My W-2 Consent Elections with new screenshot.

HR, ESS, & Leave > Employee Self Service > Employee Self Service Overview - added

link for W-2 Consent Elections.

Payroll > Pay Employees – Manage Payroll > Process a Payroll > Create a Payroll Register – added new field 'Exclude Additional State/Federal Withholding' with new screenshot.

My AptaFund > Employee Self-Service > My Deductions - Print Request – can only print approved requests.

Screen updates:

HR, ESS & Leave > Human_Resources > Employee_Contracts

HR, ESS & Leave > Human_Resources > Jobs > Mass Update Job Information

HR, ESS & Leave > Leave > Manage Leave

Budget & G/L > Budget > Budget Management – Updated all screenshots where the Propose Account Budget tab was replaced with new Edit tab.