AptaFund 4.1 Release Notes — 2016.01.09 Update

Harris School Solutions has implemented an issue tracking system, named JIRA, to help us monitor program enhancements and defects. In the future, you will be able to reference these issue numbers through Harris eSupport. The APTAWEB numbers refer to the issues in JIRA that were resolved in this release.

Note: Issues marked with two asterisks (**) will be described more completely in technical notes available on eSupport.

New Features

- **Affordable Care Act**
    - ** Form 1094-C: Added this form and the ability to edit it to the Manage Export window. APTAWEB-4347
    - ** 1095-B Form: Added this form to be used by employers with fewer than 50 employees. APTAWEB-4574
    - Manage Export
        - New feature to create the XML file containing the manifest, 1094-C, and 1095-Cs as required by the IRS. Access the feature by selecting Manage Export from the ACA menu. APTAWEB-4299
        - Added a popup window to edit monthly coverage details for the employee and the covered months for the employee's existing dependents. This form doesn't allow adding dependents or adding months of coverage. APTAWEB-4484
        - Added validation and upload error tracking. APTAWEB-4534
    - Manage Dependents: New feature allows you to add, edit, and delete dependents for employees. APTAWEB-4369, APTAWEB-4372

Improvements

- **Accounts Payable > Vendor Invoice**: Credit memos are now displayed as negative amounts and included as negative amounts in the sum aggregate of the Invoice Total column. APTAWEB-4285
- **Administration > Manage Users**
    - Attachments: Users are now given access to attachments based on their access to the windows in which the files are attached. For example, if users don't have access to Purchasing > Purchase Order, they won't be allowed to see any files attached to purchase order records. These permissions have been added to the security templates. APTAWEB-4359
    - ** Employee ID: You must now uncheck the *This User is an Employee* checkbox before saving a user account without an employee ID. This feature allows you to save a user account without associating it with an employee, but prevents you from accidentally forgetting to associate the user account with an employee. APTAWEB-4541
- **Affordable Care Act**
    - 1095-C report
        - Records for the report are now displayed on a grid and can be filtered & sorted for printing. APTAWEB-4353
        - The entire form now prints and includes only the dependents covered in the reporting period. APTAWEB-4536
        - The report can now be printed on either plain paper or self-mailer stock. APTAWEB-4315
        - The report now includes dependent and self-insured information. APTAWEB-4537
    - Manage Dependent Health Coverage: Can now edit dependent records from this window. APTAWEB-4371
    - Manage Employee Health Coverage: The list of employees included in the Add Employee Health Coverage window now includes only employees who have been paid in the year being reported. APTAWEB-4626

- **Human Resources > Manage Employees**: Added a *Return to Employee* link to the Job Details page reached from the Employee Details page. This link allows you to return to the employee record instead of the Employee Jobs page. APTAWEB-4167
- **Payroll**
  - Deduction Assignment: The following fields are now set to No by default — Earned Income Credit, Medicare Exempt, and FICA Exempt. APTAWEB-3735
  - ** Manage Deductions & Deduction Assignment: AptaFund will maintain the Tax Sheltered Annuity basic annual and age catch-up caps for each calendar year as published by the IRS. During payroll processing, AptaFund will use the increased TSA annual cap for employees that will be over 50 years old in the calendar year in which the register is processed. APTAWEB-3388
- **State Specific**
  - Colorado > CDE December Staff Report: Improved the performance to load grid data much more quickly. APTAWEB-4532
  - Pennsylvania > PIMS report: Added a new Human Resources Configuration value to determine which data will be used for Staff Assignment reporting. Customers now have the option to use Assignment data if it exists, use only Assignment data, or use Job data only. APTAWEB-4185
- **User Interface**
  - Drop-down lists for Vendor Invoice, Purchase Requisition, Payroll Register – Hours, Purchase Order, and Cash Receipt have the new interface that makes it easy to select data. Beginning to type a value in the field causes the drop-down to display values beginning with, or containing, the letters that were entered. Tabbing out of the field before completely entering the value causes the first value in the filtered list to be selected. APTAWEB-4337
  - Payroll performance issues
    - Deduction Assignment: The Percentage, Fixed Amount, and Direct Deposit tabs now load much more quickly. APTAWEB-4439
    - Employee Payroll Info: This grid now loads much more quickly and has a spinner to indicate that the page is loading. APTAWEB-4478
    - Manage Payroll: Improved the time to refresh the page when adding an employee to a payroll register. APTAWEB-4509
  - Purchasing Configuration > Element Restrictions tab: Removed extra empty space below the grid to allow it to be bigger when auto-resized. APTAWEB-4526
  - Reports > Report to Grid framework: Added a Reports link to the breadcrumbs in the report grid window that when clicked returns you to the report setup window with your parameters saved. APTAWEB-4261

Bugs Fixed

- **Accounts Payable > Vendor Invoice**: Due date are now correctly saved when entered. APTAWEB-4513
- **Affordable Care Act**
  - 1095-C report
    - The safe harbor code, coverage offer code, and employee share of lowest premium are now being correctly reported for all months on the PDF. APTAWEB-4551
    - Fixed the broken Report to PDF button. APTAWEB-4549
    - The report now includes only dependents who are covered during the reporting period. APTAWEB-4623
  - Delete employees: You can now delete an employee with a 1095-C as long as the period hasn't been locked. APTAWEB-4578
  - EIN: The employer ID (EIN) can now be entered with the dash in the format XX-XXXXXXX in both ACA Configuration and Manage Reporting Period. APTAWEB-4580
  - Manage Coverage Periods: Fixed a bug preventing users from adding new coverage periods. APTAWEB-4619

- Manage Employee Health Coverage
  - The Add Employee Health Coverage window now includes employees with hire dates within the coverage period being added. APTAWEB-4469
  - You can now add coverage for months during which a person was employed even if you're adding it after the employee has been terminated. APTAWEB-4590
  - Security: Added missing permissions for Manage Dependents and Manage Dependent Health Coverage. APTAWEB-4582
- **Capital Assets > Asset Management**: Fixed the Edit and Edit All buttons so they no longer give an error when selecting items to edit. APTAWEB-4455
- **Data Import > Payroll Management > Attendance Enterprise**
  - The import now correctly handles an apostrophe/single quote in an employee's name. APTAWEB-4404
  - The import is now completed even when errors exist, and errors are reported in the Display Exceptions grid. APTAWEB-4406
- **Employee Self Service > Leave Requests**: Fixed a bug that was causing leave to be spread over non-work days. APTAWEB-4542
- **General program**: Increased the folder size for attachments so file attachments will be accepted. APTAWEB-4527
- **Human Resources**
  - Employee Job Detail: Account allocations are now correctly calculated when using Percent of Total allocation. APTAWEB-4547
  - Position Management: Added a new Closed status for positions. Closing a position no longer sets its status back to New. Closed positions cannot be deleted. APTAWEB-4397
- **Payroll**
  - Deduction Assignment > Deduction Set Detail: Deduction start & end dates are now populated with pay periods; percentage deductions now auto-populate the percentage when there's a default value; and employee percentages are correctly displayed on the Percentage tab. APTAWEB-4548
  - Manage Payroll > Register Detail
    - The Deduction Selector popup no longer appears in error when removing a job from a register. APTAWEB-4332
    - Removed a false error message generated when adding a supplemental job to a payroll register. APTAWEB-4361
- **Purchasing > Purchase Order**: The use tax default rate is now auto-populating when creating PO line items — when the Purchasing Configuration value *Automatically Default Use Tax* is set to Yes and the vendor record is set to *Use Tax Default – Automatic or Always Yes*. APTAWEB-4543
- **Reports**
  - General Ledger > Account Summary report: The report now correctly shows detail when run without subtotals. APTAWEB-4499
  - Payroll > Form W-2 Wage and Tax Statement: The system no longer prints W-2 forms for employees who have chosen to receive electronic delivery on the Electronic Delivery tab in HR > Manage Employees > Employee Details. APTAWEB-4524
- **State Specific**
  - California
    - LA County STRS/PERS report: Added the Employer deduction amount and percentage back into the report and recap sheet, but *not* to the data export. APTAWEB-4550
    - Payroll Configuration: The PERS State Reduction Certificated Deduction pull-down now contains the correct values. APTAWEB-4465
  - Texas > Payroll Configuration: The TRS Care Deduction, TRS Retirement Deduction, TRS Special Service Payroll Deduction, and TRS Care District Contribution Deduction pull-downs now contain the correct values. APTAWEB-4465
- **User Interface > Account Code Allocation**: Fixed the tab order for the Account Code Allocation popup window. APTAWEB-4179