Harris School Solutions has an issue tracking system to monitor program enhancements and defects. The APTA numbers refer to the issues in that system that were resolved in this release.
To submit an idea for product enhancements/improvements, click **Here**.

Technical Documents

Issues with an asterisk (*) have a technical document available on Team Support and in the online help.

Features with a 💡 denotes that the feature came out of the contributions in the Client Idea Portal.

Federal/State Regulation

Reports

APTAFUND-4165

Colorado December Staff Assignment Report: A new CDE Staff Assignment file for the 25-26 academic year has been developed. This file is designed to meet the requirements for the Staff Interchange. This update ensures compliance with the latest reporting requirements and includes a functional hyperlink for easy editing.

APTAFUND-4164

Colorado December Staff Profile Reporting: Staff Profile report for the 25-26 academic year has been created, removing fields previously included in the Staff Evaluation report. This update ensures compliance with the latest reporting requirements and includes a functional employee hyperlink for easy editing.

Improvement

General Ledger

APTAFUND-4072

Journal Entry: A new warning system has been implemented for journal entries. Users will now receive a pop-up alert when attempting to post a transaction dated for a future year, enhancing accuracy in financial record-keeping.

Payroll

APTAFUND-4235

Payroll Liability Voucher Form: The Payroll Liability Voucher Form has been improved with similar enhancements to the ME Payroll Register Voucher Form. These changes include customizable signature lines, editable text, and the use of fiscal year dates instead of period dates.

Reports

APTAFUND-3431

Benefit Management Census Report: The Benefit Management Census Report has been updated to include Social Security Number and Email fields. This change accommodates the new template requirements from American Fidelity, improving compatibility with their benefits and census system.

APTAFUND-4005

Benefit Management Report: The Benefit Management Report has been updated to include the employee names on the Benefit File Information Tab. Previously, this information was only available on the Census File Information Tab, but it has now been added to improve data consistency and accessibility across the report.

APTAFUND-3389

Payroll Voucher Form: The Payroll Register Voucher Form has been enhanced with several improvements. These include using fiscal year dates instead of period dates, multi-select functionality for registers, and customizable signature lines and text.

New Feature

Accounts Payable

AFD-569

Ability to separate vendor payments within the same voucher: Per client feedback in the Idea portal, a new 'Separate Payment' checkbox has been introduced in the Vendor Invoice Detail and Edit Invoice screens. This feature allows users to specify whether a check should be combined with other checks from the same vendor or kept separate.

Contact Management

AFD-331

PA PSD Look-up: The Pennsylvania Location Code Lookup has been upgraded from LCS to SLS service. This update supports a more flexible location code format, less data entry by the client and confirmation of PSD code correctness when look-up is performed.

Exports

APTAFUND-4203

More Menu – Quick Links for ACH Export To align with Manage Payroll, the Payroll Liability Voucher and AP Payment Voucher screens now include quick links to the AP ACH Export and Payroll ACH Export under the Print Warrant/Print Check commands.

Human Resources

APTAFUND-4221

Manage Employee Filters: Per client feedback in the Idea Portal, new fields have been added to the Manage Employees section for improved sorting and reporting. Users can now filter and sort by Social Security Number and Rehire Date, enhancing data management capabilities.

APTAFUND-4222

Manage Employees Rehire Date: Per client feedback in the Idea Portal a new Rehire Date field has been added to the Manage Employees section. This field will be displayed in the grid, searchable in quick search, and located near the Hire and Termination dates, improving employee record management.

Payroll

APTAFUND-4217

Payroll Payment Plans: Per client feedback in the idea portal, A new feature has been added to the payroll configuration, allowing users to set a default Payment Plan in HR Configuration. This improvement streamlines the process of setting up new salary positions by automatically populating the payment plan for the Edit Payment Plans pop-up.