

# **AptaFund 5.0 Release Notes**

2025-R5B Update Released: 11/07/2025

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.

# **Federal/State Regulation**

## **Exports**

#### **APTAFUND-4170**

2025 W-2C Export: The W-2c forms export functionality has been updated to align with the 2025 specifications. While no changes were made to the form itself, any modifications to the export process have been implemented to maintain compliance.

## **Payroll**

#### **APTAFUND-4162**

2025-W2 Data Export: The W-2 Data Export has been updated for the 2025 tax year. This annual update ensures compliance with the latest federal reporting requirements for employee wage and tax statements

# Reports

#### **APTAFUND-4163**

1099 MISC and NEC Forms: The 1099 MISC and NEC forms for Tax Year 2025 have been updated. These changes reflect the latest IRS requirements for reporting various types of income other than wages, salaries, and tips.

#### **APTAFUND-4169**

2025 W-2C Forms: The 2025 W-2c forms have been reviewed and updated as necessary to comply with the latest IRS specifications. This ensures accurate reporting of corrected wage and tax statement information for the upcoming tax year.

#### **APTAFUND-4032**

PA Annual W-2 Export: The Pennsylvania Annual W2 Export has been modified to comply with the new Berkheimer format. The export now generates a comma-delimited CSV file that adheres to the updated specifications, ensuring accurate reporting for Pennsylvania customers.









# **AptaFund 5.0 Release Notes**

2025-R5B Update Released: 11/07/2025

# **Improvement**

## Reports

**AFD-429** 

W-2 Adjustment Report: The W-2 Adjustment Report has been updated to accurately reflect current box numbers used. This improvement addresses issues with Box 17 State Income Tax reporting and ensures all relevant boxes are properly populated with correct information.

## **New Feature**

## **Import**

**AFD-601** 

Employee Demographic Import: A new field, hrEmployee RehireDate, has been added to the Employee Import functionality. This enhancement allows for more comprehensive employee data management, particularly for rehired employees.





