




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 **See Tech Doc** notation have a technical document available on Team Support and in the online help.

Issues with a  notation denote that this item came from the client idea portal.

## Federal/State Regulation

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### APTAFUND-4397

2026 941 and Schedule B: The 941 Form, associated Schedule B, and related informational report have been updated for the 2026 tax year. These updates ensure compliance with the latest federal filing requirements including the new section 'Aggregate Return Filers Only'.

## Improvement

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### Reports

#### APTAFUND-4321

Fund Audit Report: The Fund Audit Report has been enhanced to include activity spanning multiple fiscal years. This supports tracking funding sources, such as multi-year federal grants, across all relevant fiscal periods in a single report output.


#### APTAFUND-4359

NH Monthly Wage and Contribution Report: The XML export for the NH Monthly Employee Wage and Contribution report now removes dashes from Social Security numbers. This produces a file format that is accepted by the state without requiring manual SSN edits.

## New Feature

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### APTAFUND-4369

Budget Insight: Per an idea in the Idea Portal, Payroll and GL detail views now provide an indicator showing whether account code line items have been sent to Budget Management. This helps users confirm the status of lines after processing payroll and general ledger entries. The detail columns will show the user who sent the item to budget management as well as the date. 





## APTAFUND-4366


Employee Wages by Date Range Report: Per an idea in the Idea Portal, The Employee Wages by Date Range report now includes a Site field and a multi-select parameter to filter by one or more sites. This enables more targeted wage reporting by location. 

## PS2AF-68


PA Manage Employees Grid Report: A new PSD Codes grid report is available from the Manage Employees screen to display each employee's Home PSD code and Work PSD code. This report assists Pennsylvania users in verifying PSD tax codes after data conversion, before running payroll or other processing.

## Budget Management

### AFD-641


Budget Management and Budget Item Details: Per an idea in the Idea Portal, Budget Management and Budget Item Details now includes a dedicated Budget Item Source field to indicate how each budget line was created, such as through Budget Requisitions or Budget Preparation. This separates source details from the comment field so comments remain available for customer-specific notes. 

### APTAFUND-4334

Budget Management: Per an idea in the Idea Portal, Budget Management now displays the Budget Category for budget lines and includes this field when exporting to Excel. Users can sort and organize their budgets by Budget Category directly from the screen or in exported files. 

## Budget Requisitions

### APTAFUND-4336

Budget Requisitions: Per an idea in the Idea Portal, Budget Requisitions now include a print option similar to Purchase Requisitions. Staff can generate printed copies of budget requisitions for review, routing, or record-keeping. 





## Reports

### AFD-552

PA AFR: The Location Element feature is now enabled for Pennsylvania databases to capture School Code values used in the PDE 2057 AFR report. The PDE 2057 AFR now uses School Code data from the standard location table, and the prior custom PDE Building Code field has been retired.

### APTAFUND-4111

The Monthly Totals Report: The Monthly Totals Reports now support selecting multiple employees instead of only a single employee or all employees. This allows users to generate reports for specific groups, such as certain positions or departments, without manual data cleanup.

