



AptaFund 4.1 Release Notes

1


2026-R4 Update

Released:
5/01/2026

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 the **See Tech Doc.** notation have technical documents available on the Release Pop-Up and Help Guide.

Issues with  notation denotes this issue was a customer idea taken from the idea portal.

Bug Fixes

Manage Employees

AFD-621

Manage Employees: The Manage Employees screen no longer jumps to the lower tabs section when an employee record is opened for viewing or editing. The view now remains in the General section at the top, providing a more consistent and efficient editing workflow.

Reports

APTAFUND-4384

Maine New Hire Report: The Maine New Hire report export has been updated so that social security numbers and column formatting align with the State of Maine's accepted templates. Files generated from the system now follow the required format for both Excel and CSV submissions, allowing successful state uploads

Federal/State Regulations

Reports

APTAFUND-4398

Colorado Staff Evaluation Report: The 2025-2026 CDE Staff Evaluation Report has been updated to reflect the latest annual reporting changes. These updates ensure the report remains compliant with current state evaluation and reporting requirements.





Improvements

Human Resources/Payroll

AFD-685

Employee Jobs Tab: The encumbered column on the JOBS tab in Manage Employees now reflects the correct value based on the job's status and related records. This ensures encumbrance information displayed for jobs is accurate at approval and remains consistent throughout the program

Reports

AFD-745

Pennsylvania UC-2/UC-2A Forms: The PA UC-2 and UC-2A forms now support adding and editing grid data to facilitate mid-quarter or July 1 conversions. Users can add employees and update key fields such as gross earnings, taxable earnings, and credit weeks directly in the forms.

APTAFUND-4265

Nebraska NPERS Wage and Contribution Report: The NPERS Wage and Contribution report has been enhanced to allow selection of payroll registers whose pay dates span consecutive months. This supports combined NPERS filings when reporting periods cross a month boundary.


APTAFUND-4256

GL Detail Report: The GL Detail Report now includes Origin as an available column. This provides additional context for transactions and supports more detailed financial analysis and auditing.

New Features

Email Functionality

APTAFUND-4344

Leave Requests: Per an Idea in the Idea Portal, Approvers now receive notifications when a leave request is adjusted or cancelled. This helps ensure all participants in the approval chain are informed of changes, reducing scheduling conflicts such as unnecessary substitute assignments. 







New Features Continued

Purchasing


APTAFUND-4137

Purchase Requisitions with Budget Permissions Template: Per an Idea in the Idea Portal, Purchase requisitions can now be tied to budget amounts and will display a warning when a request exceeds the available budget. This allows requisitioners to continue submitting over-budget requests while giving approvers clear visibility into budget impacts before making approval decisions. 

APTAFUND-4252

Purchase Requisitioners: Per an idea in the Idea Portal, Requisitioner names now remain visible across related purchasing workflows, including purchase orders and regular invoices. Users can also view the requisitioner in PO and invoice grids and optionally include the requisitioner name when printing purchase orders. 

APTAFUND-4252

Purchase Orders: Per an idea in the idea portal, users can now copy purchase orders from a prior fiscal year into the current or a future fiscal year. This streamlines creating recurring annual POs by reducing manual data entry. 

Reports

AFD-732

Employee Wages by Date Range Report: The Employee Wages by Date Range report now includes a column for qualified overtime. This enables customers to more easily identify overtime amounts needed for tax reporting.

