411 Webinar

November 19, 2025

IMS BUSINESS

Region 16

Announcement

- **New Addition to the IMS Business Team**
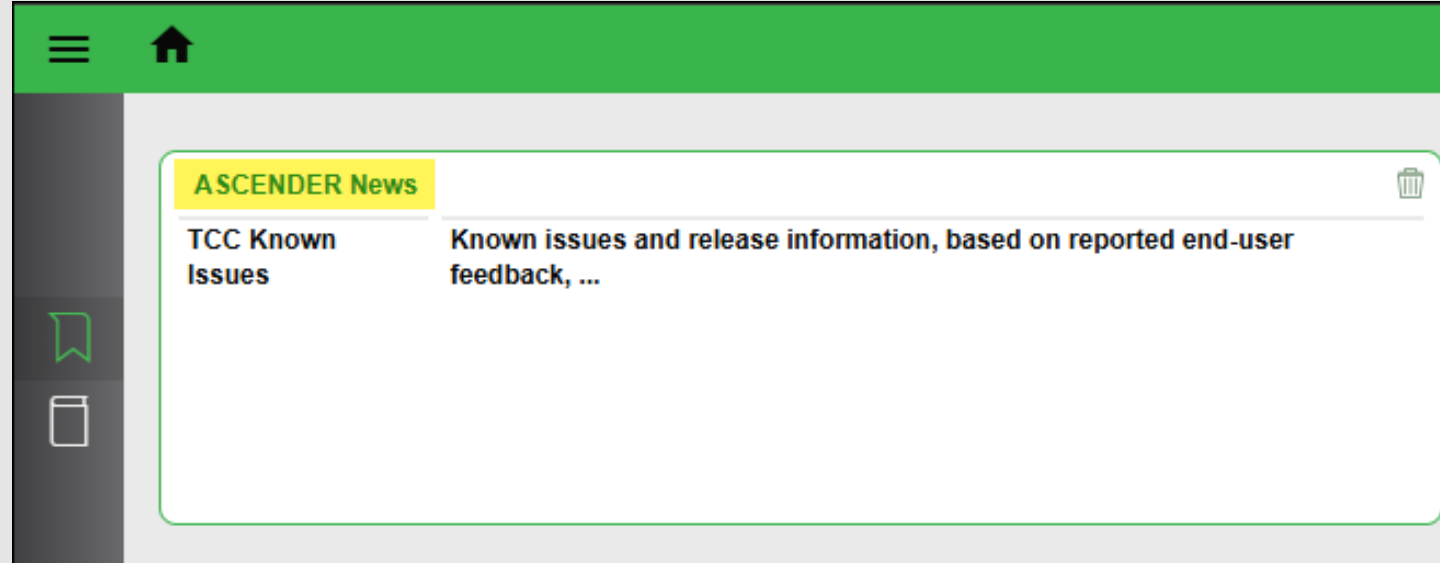 - Charlotte Nord, IMS Specialist

ASCENDER Updates

ASCENDER Releases:

Recent Update 11.0306 (installed on 11/18/25)

ASCENDER Dashboard

- Updated the program so **TCC Known Issues** news displays on the ASCENDER dashboard.

ASCENDER Reports

- **Business Reports**
  - To ensure data integrity and system performance, the TCC has disabled the **Preview** button functionality for certain reports. This change means that the Preview option will no longer be available when generating certain reports. **A limited number of <u>business reports</u> will continue to include the Preview button**, as they do not offer CSV or PDF export options. At this time, there is not an estimated date for when this button may possibly be re-enabled.
  - [IMS Business Announcement](#) (sent on 10/24/25)

District Administration

- **District Administration > Tables > District Information > Fall Finance TSDS Data**
  - Corrected the program to only display data from the year specified in the **Year** field. Previously, the page displayed prior year data.
- **District Administration > Maintenance > Non-Employee**
  - Added the **TRA Years Experience** section to align with TSDS Web-Enabled Data Standards.
- **TSDS Extract**
  - Added the following fields to the 2026 Staff extract and view to align with TSDS Web-Enabled Data Standards:
    - TRA Teaching Experience
    - TRA Eligibility

Personnel

- **Personnel > Maintenance > Staff Demo > Responsibility**
    - Corrected the following known issue that was previously identified in 11.0210: A known issue may cause -6 errors during TSDS extraction if responsibility records are submitted and then changes are made to the **Campus, Staff Classification**, and/or **Begin Date**.
    - Modified the program so that when changes are made to the following key fields in a responsibility record, the original record is deleted and a new record is inserted to reflect the change. This will assist the with data management required for TSDS staging tables.
        - **Campus**
        - **Role ID**
        - **Begin Date**

Personnel

- **Personnel > Reports > Personnel Reports > HRS1250 - Employee Data Listing**
  - Added the **TRA Years** Experience section from the Personnel > Maintenance > Employment Info page to the report.

Payroll

- **Payroll > Reports > Payroll Information Reports > Employee Responsibility Data Report - HRS6350**
  - Corrected the issue that caused the report to be blank.

Reminders
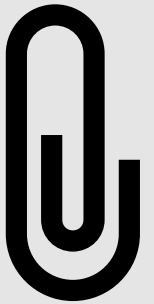
Things to Remember

Reminders

- **November TRS Update**
  - Includes info, reminders, and updates

Reporting Employers
UPDATE
TEACHER RETIREMENT SYSTEM of TEXAS

Reminders

- **Federal Legislation - Overtime Provisions**
  - Overtime wages may now be deductible on an individual's tax return, making them non-taxable for federal income tax on the employee's side.
  - Employer-side federal tax withholding remains unchanged.
  - W-2 changes coming: Overtime will be reported separately. *Early December is the targeted release for any ASCENDER-related changes.*

Reminders

- **Federal Legislation - Overtime Provisions (cont'd)**
  - Eligible overtime wages: Must meet FLSA standards- 1.5 x pay for hours worked over 40. Wages at different rates or thresholds (e.g., 2x or over 37.5 hours) do not qualify and must be excluded.
  - Manual tracking may be required. Overtime not processed through standard overtime fields in ASCENDER (e.g., manually entered supplemental pay for Type 2 employees) must be manually captured for reporting.
  - How to Prepare
    - Begin reviewing/gathering employee overtime information starting with January 2025 for the 2025 calendar year (timesheets, spreadsheets, etc.)
    - Was all overtime paid on the Overtime Hours pay transmittal tab in Payroll?

Reminders

- **FY2025 Annual Financial Report Submission (AFR)**

- TAA Letter from October 16
 - At present, the revised submission due date for all LEAs is **Feb. 27, 2026**.

Reminders

- **Roll Balances Supplement**
  - This guide will assist in the process of posting opening balance sheet amounts to File ID C.
    - This supplement is for LEAs who did not close revenues and expenditures and did not carry forward balance sheet account balances to the new fiscal year.

  - **IMPORTANT**: If your auditor provides opening entries that you enter in File ID C, you will NOT utilize this option.

Reminders

- **Fall PEIMS Submission**
  - Snapshot Date: **October 31, 2025**
  - TEA Due Date: **December 11, 2025**
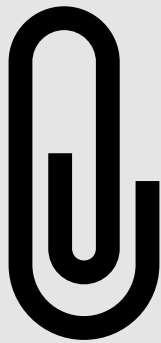
Reminders

- **October 411**
  - Recording & slides available
  - **Spotlight**: TSDS PEIMS Fall Submission for Business

Reminders

- **Verify Account Access for IRS and SSA Reporting**
  - If you haven't already done so, please review whether you already have an account for the appropriate reporting entities that you will have to submit for and if you have set up the additional requirements for reporting.
  - **Account Types for Reporting to the IRS**
    - FIRE or IRIS (for 1099s), AIR (for 1095s), and TIN
  - **Account Types for Reporting to the SSA**
    - BSO (for W-2s)
- It's important to verify the status of these accounts and address any verification issues promptly to avoid delays in compliance and reporting.
- Note: TCC will add functionality to use the IRIS system for the tax year 2026.

Reminders

Website & IMS Business Login
- Username: **imsbusiness**
- Password: **busims16ESC!**

Reminders

- **Subscribe to IMS Announcements**
  - Log into the IMS Business Homepage
  - Click on **Subscribe to IMS Announcements**, fill out form, and submit

Reminders

Subscribe to IMS Announcements

IMS Business Training Schedule 2025-2026

New District Employee Form
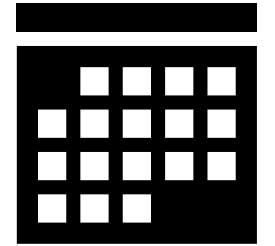
- **New District Employee Information Form**
  - Let us know about new employees or changes in staff who use ASCENDER
  - Log into the IMS Business Homepage
  - Click on **New District Employee Form**, fill out form, and submit

Reminders

- **Region 16 Closed for Thanksgiving Break**
  - Wednesday, November 26th - Friday, November 28th

Upcoming Trainings

Webinars & In-Person

2025-2026 IMS Business Trainings

Training

- IMS Business
- Announcements
- Training
- Documentation
- 411 Webinar
- Helpful Links
- Support

Subscribe to IMS Announcements

IMS Business Training Schedule 2025-2026

IMS BUSINESS — Region 16 ™

IMS Home | IMS Business | IMS Student | IMS TSDS

Use the session links in the document below to register for upcoming trainings

2025-2026 Business Training List

To request an ASCENDER Business Training Recording, please complete the form below.
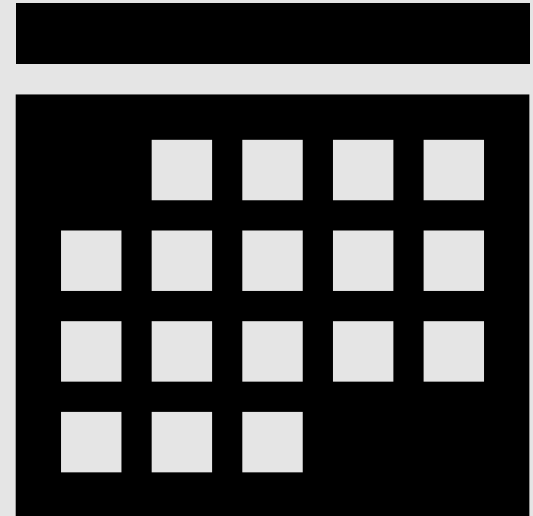
Business Training Recording Request Form

IMS ASCENDER Business Trainings
September 2025 - August 2026

Registration links for trainings are linked in the Session # column found below. Click the link and follow steps to complete the registration process.
411 webinars are recorded and posted on the IMS Business page.
Other Zoom training courses are recorded and available upon request by completing the Business Training Recording Request Form on the IMS Business Training Page.

Session #	Date	Start	End	IMS Business Trainings
1029850	9/11/25	9:00 AM	4:00 PM	TEA Student Attendance Accounting Handbook Review
1031746	9/24/25	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
1031749	9/25/25	9:00 AM	11:00 AM	Business - New User Overview (Zoom)
1031751	9/30/25	9:00 AM	11:00 AM	Purchasing – New User Overview (Zoom)
1031752	10/27/25	9:00 AM	11:00 AM	Personnel & PR - New User Overview & New Employee Setup (Zoom)
1031756	10/27/25	1:30 PM	3:30 PM	Payroll Processing for New Users (Zoom)
1031759	10/28/25	9:00 AM	11:00 AM	TRS Reporting Process for New Users (Zoom)
1031760	10/29/25	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
1031766	11/11/25	9:00 AM	11:00 AM	Finance - New User Session 1 (Zoom)
1031768	11/11/25	1:30 PM	3:30 PM	Finance - New User Session 2 – UPDATED DATE (Zoom)
1031771	11/19/25	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
1031773	11/20/25	1:30 PM	2:15 PM	Business - New User Check-In (Zoom)
1031780	12/9/25	9:00 AM	11:00 AM	W-2 Processing (Zoom)
1031782	12/9/25	1:30 PM	3:30 PM	1099 Processing (Zoom)
1031783	12/10/25	9:00 AM	11:00 AM	1095 Processing (Zoom)
1031785	12/17/25	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
1031787	1/21/26	1:30 PM	2:15 PM	Business - New User Check-In (Zoom)
1031788	1/28/26	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
1031813	2/10/26	9:00 AM	11:00 AM	Bank Reconciliation (Zoom)
1031819	2/10/26	1:30 PM	3:30 PM	Credit Card Reconciliation (Zoom)
1031821	2/18/26	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
1031716	3/4/26	9:00 AM	4:00 PM	Budget Process & Next Year Payroll Process
1031825	3/25/26	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
1031828	3/25/26	1:30 PM	2:15 PM	Business - New User Check-In (Zoom)
1031854	4/9/26	9:00 AM	11:00 AM	Business Tips, Tricks & Reminders (Zoom)
1031837	4/29/26	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
1031849	5/20/26	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
1031863	5/21/26	9:00 AM	11:00 AM	Creating Service Records (Zoom)
1031832	5/21/26	1:30 PM	2:15 PM	Business - New User Check-In (Zoom)
1032942	6/10/26	9:00 AM	12:00 PM	Setting Up & Managing Student Activity Funds (Zoom)
1031867	6/16/26	9:00 AM	12:00 PM	EOY Processes for June Fiscal Year-Ends (Zoom)
1031871	7/16/26	9:00 AM	12:00 PM	District Administration & Security Administration (Zoom)
1031717	7/22/26	9:00 AM	12:00 PM	EmployeePortal: Overview & Set-Up
1031718	8/5/26	9:00 AM	4:00 PM	EOY Processes for End of Fiscal School Year
1031852	8/26/26	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)

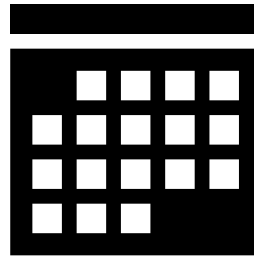**REGION 16** Education Service Center — Serve. Lead. Ignite.

411 Webinar
(Begin at 10:00am)

- **December 17th**
  - Session #: [1031785](#)
- **January 28th**
  - Session #: [1031788](#)
- **February 18th**
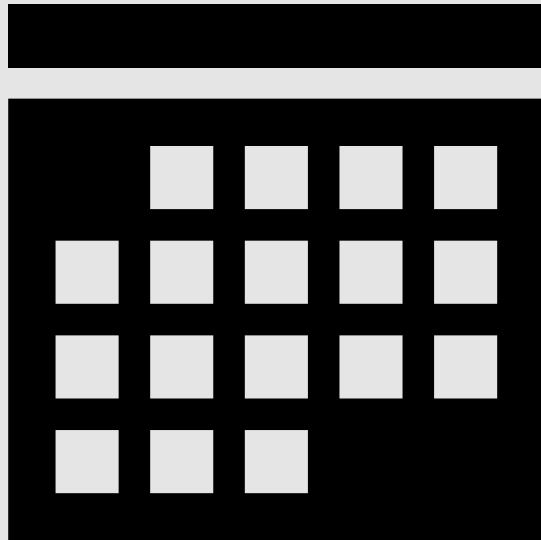 - Session # [1031821](#)

Business – New User Check-Ins (Zoom)

- New User Check-Ins
  - **November 20th @ 1:30p-2:15**
    - Session #: 1031773
  - **January 21st @ 1:30p-2:15**
    - Session #: 1031787

IMS Business Trainings (Zoom)

- W-2 Processing
  - **December 9th @ 9:00a-11:00**
  - Session #: 1031780

- 1099 Processing
  - **December 9th @ 1:30p-3:30**
  - Session #: 1031782

- 1095 Processing
  - **December 10th @ 9:00a-11:00**
  - Session #: 1031783

2026 ASCENDER Business Conference "Taking Care of Business, The ASCENDER Way"

- **June 23-25, 2026**
  - Will be held in San Antonio, Texas
  - Early Bird Registration September 1, 2025 – January 3, 2026 for $300
    - Starting January 4, 2026 will be $330
  - Sessions are presented by ASCENDER consultants from around the state
  - This user conference will be business only
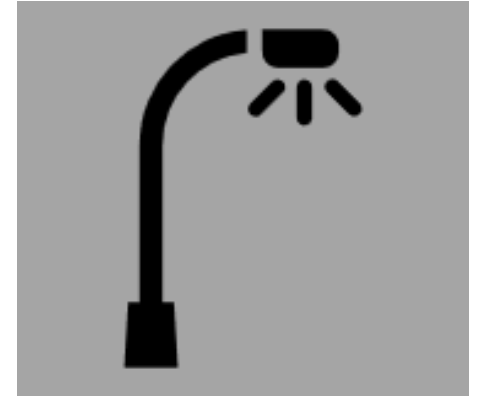 - Region 20 ESC Session # 110391

Spotlight

Latest Updates Regarding Fall PEIMS

Latest on Employment Dates

Personnel > Maintenance > Employment Info

- **Termination Dates** should always be reported and captured. If an employee leaves and returns, there is a **Rehire Date** field that can recapture the employee's reemployment with the district. The system is set to capture these details.

- Deleting the **Termination Date** affects the TSDS reporting source and staging tables. It is important that **Termination Dates** and **Reasons** remain current and up-to-date so that the system is capturing and reporting the correct data. If deleted, this could create potential orphan records.

- At this time, we do not recommend retroactively adding Termination Dates to employees who "should" have one per this guidance.

- Note: Payroll warnings do not prevent districts from submitting and processing payroll.

Latest on Employment Dates

Personnel > Maintenance > Employment Info

- Updated information has been added to Help

As you are making changes to employment dates, review the following examples for additional guidance on terminations, rehires, and change in positions:

Example 1: Termination Date

Employee A works for ABC LEA and leaves employment on 05/30/2025. Therefore, a termination date of 05/30/2025 must be entered. Later, Employee A returns to ABC LEA with a new start date of 08/12/2025. The original **Termination Date** of 05/30/2025 remains in place and the new start date should be entered in the **Rehire Date** field.

Example 2: Change in Position

Employee B is hired by ABC LEA as a paraprofessional with a hire date of 08/30/2025. Later, they obtain a teaching certificate and move into a teaching position starting 01/06/2026. In this case, the paraprofessional position should be ended and paid off on the Job Info record through 01/05/2026. The new teaching position should then be added with a beginning contract date of 01/06/2026. **Note**: The employee should not have a termination date or a rehire date since this is a change in position and not a separation from employment.

Budget and Payroll Extracts
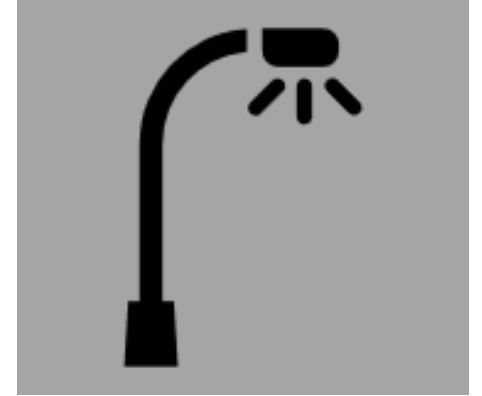
Latest on Budget and Payroll Updates – Closing Period 10

- There is a known issue where TSDS extracts are <u>not</u> capturing any changes to the budget data or the payroll distribution records made directly in ASCENDER.

- TCC has replicated the issue and is working on a solution for this.

- If your district has not yet closed accounting period 10, we recommend leaving it open until the fix is deployed. Once the correction is applied, the data will re-extract and should update the reported data. *(Estimated release is currently scheduled for November 20th.)*

- **NOTE**: If your district has already closed accounting period 10, changes will need to be made manually on the **Fall Finance TSDS Data** screen in District Administration. Districts can do this immediately and do not have to wait for the fix to use this option.

Closing Period 10
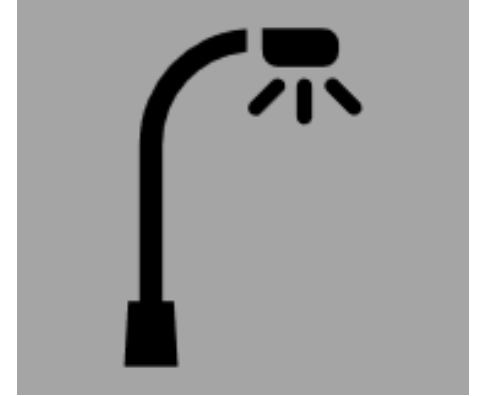
When running the **End of Month Closing** process for accounting period 10 in Finance, the message displayed will be updated to include additional clarification about closing period 10. The message will now read as follows:

- *The budget and payroll data are extracted nightly along with the other TSDS extracts until period 10 is closed. After period 10 closes, the data extraction stops. The Fall Finance TSDS Data tab in District Administration becomes available for editing the day after period 10 closes. The user can then begin making corrections to the budget and payroll data on the Fall Finance TSDS Data tab.*

Other Known Issues

- **Percent Day Employed Effective Date**

 *Personnel > Maintenance > Employment Info*

  - This is currently showing up as blank. This is a display issue – the extracts and sends this data are fine.

- **TSDS Days Employed Set**

  Personnel > Maintenance > TSDS Days Employed Set

  - If employees are currently showing **0** for the **# of Days Employed** in the *Personnel > Maintenance > TSDS Days Employed Set* screen, please submit a ticket on this issue.

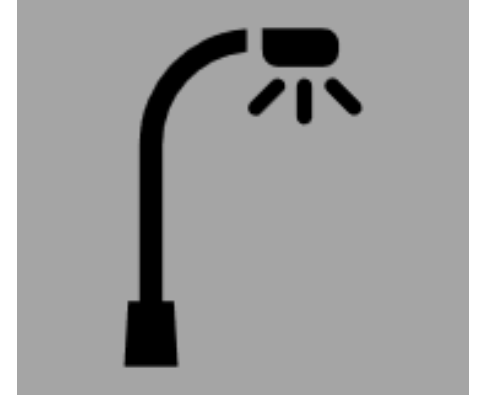 - TCC is aware of this issue and is working towards a solution.

Updated TSDS Guides
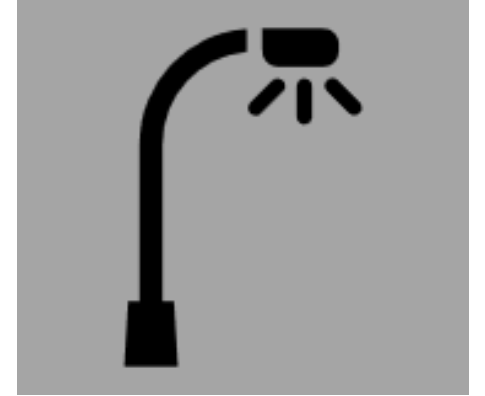
New ASCENDER guides are available that provide additional guidance on how you should add a new employee and how to process a termination for an employee:

- TSDS Best Practices for New Employee Records
- TSDS Best Practices for Terminated Employee Records

Quick Tips for Fall PEIMS

- **Be sure to update changes in Employee Status!**
- It is important to verify the **Employee Status** field in Personnel for all employees, especially when someone changes jobs and it can change if that person should or shouldn't report as of Snapshot Date.
- Important factors that affect if an employee reports for Fall PEIMS:
    - **Employee Status** (*1-5 or A will report*)
    - **Termination Date** (*if later than Employment Date or Re-Employment Date, employee will not report*)
    - **Pay Type** (*1-3 will report*)
- If an employee is changing positions, it is best to provide an updated **End Date** to the job that ended and add an additional row for the new job in *Payroll > Maintenance > Staff Job/Pay Data > Job Info*.

Helpful Links
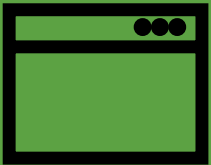
- October 411 Link (spotlight at 28:00) (on IMS Business website)
- October 411 PowerPoint (spotlight on page 31)(on IMS Bus. site)
- Fall PEIMS Submission Guide (ASCENDER guide)
- 25-26 Shared Service Arrangements with Region 16
- Texas Web-Enabled Education Data Standards (TWEDS)
- Responsibilities - Quick Reference Chart
- TIMS Ticket Link for TSDS/PEIMS Assistance
  - For TSDS Coordinators, with login credentials
- 25-26 IMS Business Trainings Link
- **Subscribe to** IMS Announcements
- **Submit a** New Employee Form
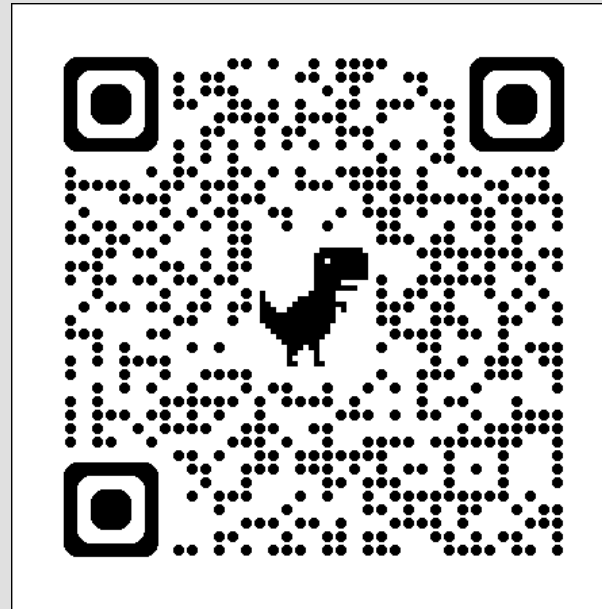- **Submit a support request via** ESC-16 ASCENDER Ticket System

Thank you for attending!

Need assistance?

Please enter an ESC 16-ASCENDER Ticket here.

This link can be found on all areas (Business, Student, TSDS/PEIMS pages) of the IMS website as well.

For **TSDS/PEIMS** related questions, please enter a **TIMS** ticket.

Please fill out a brief 3 question survey (by scanning the QR code) or clicking this link to help us improve the next Monthly 411 webinar. Thank you!