

411 Webinar

August 27, 2025



IMS BUSINESS



ASCENDER Updates



ASCENDER Releases

- Several updates over the summer
- Recent Update - 9.1211 (*installed on 8/25/25*)

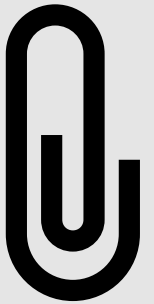
Payroll

- Modified various Payroll reports in the following processes to include the **Pay Campus** and **Pay Dept** columns. The column data originates from the Pay Campus and Pay Dept fields on the *Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab*. The report sorting will remain the same with the addition of the new columns.
 - Payroll Processing > Run Payroll > Payroll Calculations
 - Payroll Processing > Payroll Adjustments > Check Issue
 - Payroll Processing > EOY Payroll Accruals > Run Calculations
 - Next Year > Interface NY Payroll to NY Budget > Calculations
 - Zero School YTD Accrual Retiree Surcharge Extract
 - Utilities > Payroll Simulation > Calculations
 - Utilities > Payroll Accrual Variance Extract > Extract
 - Utilities > Zero School YTD Accruals > Extract

Payroll

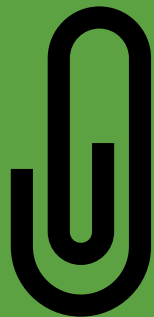
- Removed the following reports that are not available in CSV format:
 - Payroll Processing > EOY Payroll Accruals > Mass Delete
 - Utilities > Payroll Accrual Variance > Extract
 - Utilities > Zero School YTD Accruals > Extract

Reminders



Things to Remember

Reminders

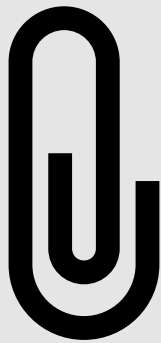


- **IMS Website & IMS Business Login**

- Username: IMSBusiness
- Password: busims16ESC!

A screenshot of the Region 16 Education Service Center website. The header features the Region 16 logo with the tagline "Serve. Lead. Ignite." and a "Select Language" dropdown. A search bar is on the right. Below the header is a navigation menu with links: "About Us", "Employment", "School Support and Academic Services", "School Services", "Business Services", and "Superintendent Resources". The main content area is titled "IMS Business" and includes a sidebar with links: "IMS Business", "Announcements", "Training", "Documentation", "411 Webinar", "Helpful Links", and "Support". A "Subscribe to IMS Announcements" button is at the bottom of the sidebar. The main content area also features a large "IMS BUSINESS" banner with the Region 16 logo, four buttons: "IMS Home", "IMS Business", "IMS Student", and "IMS TSDS", and a circular "ASCENDER TICKET SYSTEM" logo.

Reminders



- **Reviewing IMS Business Announcements, Information, and Videos**

- Relevant information, updates, and important changes are shared in IMS Business announcements and the IMS Business website.
- Verify that you are signed up and follow/review this information to be aware of important changes and updates. These can include changes from TEA, TRS, ASCENDER, etc.

Reminders



Subscribe to IMS
Announcements

IMS Business Training
Schedule 2025-2026

New District Employee
Form



- **Subscribe to IMS Announcements**

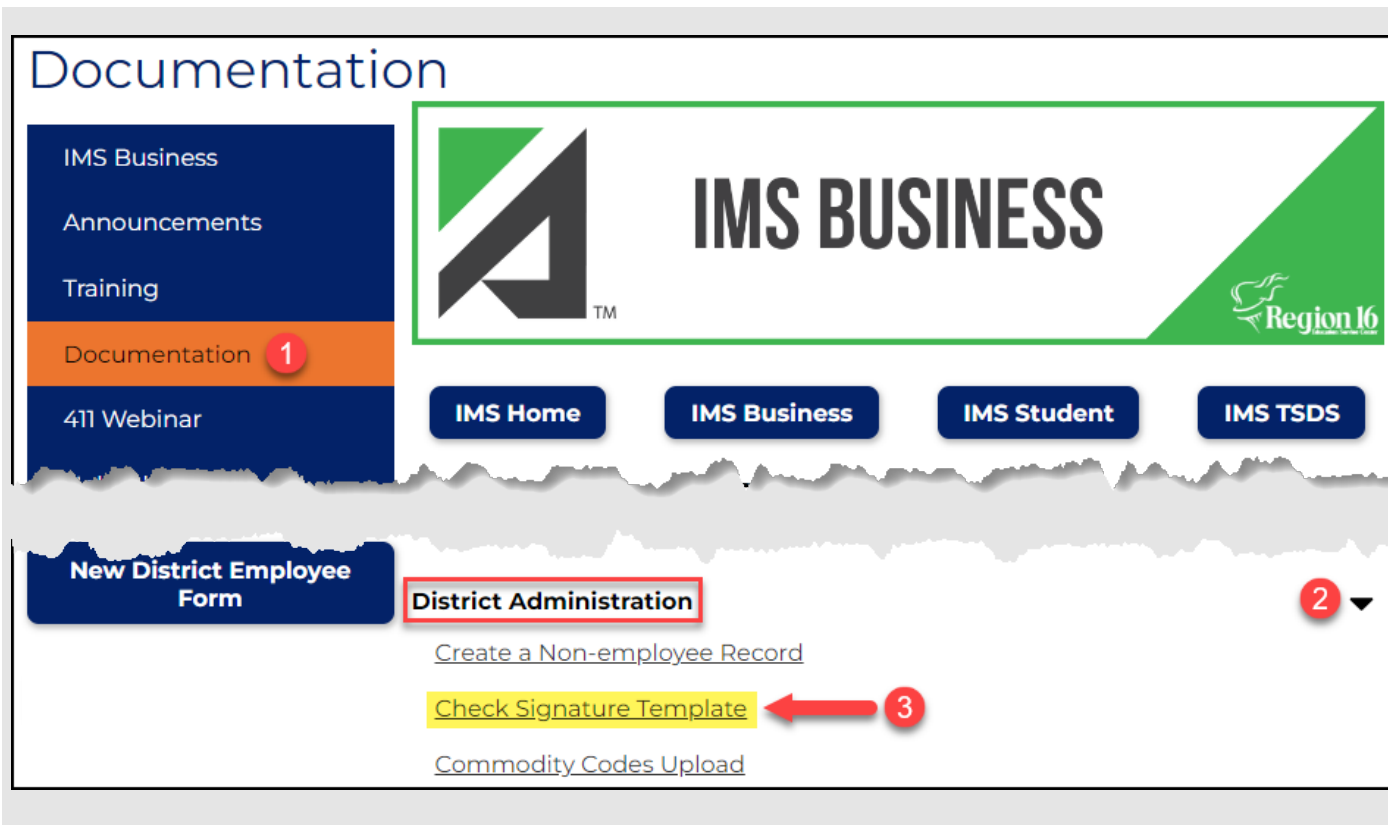
- Log into the IMS Business Homepage
- Click on **Subscribe to IMS Announcements**, fill out form, and submit

Reminders



- **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



Check Signature in ASCENDER

- Template document under **Documentation** on IMS Business website
- Must upload cropped image (from template) into ASCENDER
- *District Administration > Tables > Electronic Signatures*

Reminders



August TRS Update

- Includes important information, reminders, and updates
- August 2025 Update

Also, remember to review the updates for June and July.

- [June 2025 Update](#)
- [July 2025 Update](#)


Reporting Employers



TEACHER RETIREMENT SYSTEM of TEXAS

Reminders


*Let's take a closer look at some of the topics from the **June and July TRS Update Newsletters.***



The newsletter cover features a blue background with the title "Reporting Employers UPDATE" in large, stylized letters. The word "UPDATE" is white with a green apple icon inside the letter 'O'. Below the title, it says "TEACHER RETIREMENT SYSTEM of TEXAS". On the left, a red box highlights "JUNE 2025". On the right, it says "Vol. 44 Number 6".

SSA-1945 Form

The Social Security Administration (SSA) released a revised version of the SSA-1945 form, effective March 2025. This update aligns with the Social Security Fairness Act (SSFA), which continues to require state and local government employers to provide a statement to employees hired on or after Jan. 1, 2004, for jobs not covered under social security.



The Teacher Retirement System of Texas (TRS) retains the SSA-1945 forms for Texas public school employees. It is important for employers to ensure that employees complete and submit this form to TRS. Going forward, please ensure that newly hired employees complete the updated SSA-1945 form. The revised form can be accessed at the following link: [SSA-1945 Form](#).

Completed forms should be mailed to: Teacher Retirement System of Texas, P.O. Box 149676, Austin, Texas 78714-0185.

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Reminders



Annual Contribution Review And Collection



As we near the end of the fiscal year, TRS will begin the annual contribution review and collection for fiscal year 2025. The collection process will involve reminders to Reporting Employers (REs) with outstanding balances through the end of the fiscal year. The review and collection efforts apply to all REs.

Please take a moment to log in to the RE Portal and review all your fund type accounts on the RE Ledger, including Penalty Interest (PI), TRS-Care Penalty Interest (CI) and Penalty Fee (PF).

If you do not have any outstanding (negative) contribution balances, no action is required. Please continue to review your RE ledger balances after each report completes to ensure no negative balances are created. If you have negative balances, please be sure to remit the TEXNET deposit or complete allowable transfers as soon as possible. If the outstanding balance is due to a reporting correction needed, the adjustments must be completed by Aug. 31, 2025.

Failure to resolve the balances by the end of the fiscal year will result in additional collection efforts. The Head of Institution for any RE with negative balances after the completion of their August Regular Payroll Report (RP) and Employment After Retirement (ER) reports (due Sept. 5, 2025) will receive a demand letter.



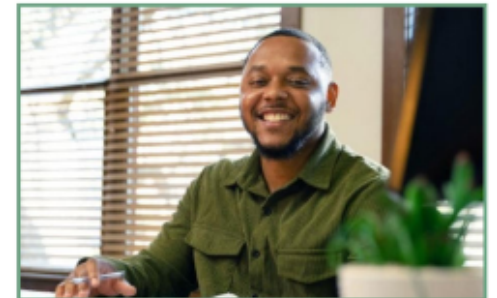
HB 2 (89R) And TRS Reporting Updates



The signing of HB 2 into law does not have major impacts on the monthly TRS reporting process. However, there are key legislative changes employers should be aware of to ensure continued compliance and accurate reporting.

HB 2 repeals Subsection 825.4092(f) of the Government Code, which prohibits employers from passing the cost of applicable surcharges to employed retirees. After this repeal, employers may choose to pass surcharge costs onto the retiree just as they did before Subsection 825.4092(f) became law in 2021. There is no impact to the reporting process based on this change, and employers remain responsible for remitting surcharges owed in the calendar month(s) that the retiree exceeds one-half time employment.

HB 2 also introduces two new allotments to provide pay increases to classroom teachers and other support staff: the Teacher Retention Allotment and the Support Staff Retention Allotment. HB 2 further provides that any increased compensation paid to teachers or support staff employed by a TRS-covered employer with funds from these allotments qualifies as creditable compensation for TRS purposes.



Reminders



Reporting Employers
UPDATE
TEACHER RETIREMENT SYSTEM of TEXAS

JULY 2025 Vol. 44 Number 7

Importance Of Non-Standard Work Week Flag

As some employers transition to varying workweeks, TRS recognizes that not all employees work the standard Monday-Friday schedule. TRS calculates a year of service differently for these employees, as it takes them longer to earn a year of service due to working fewer days per week. ([Benefits Handbook](#)).

For these employees, it is important that the **Non-Standard Work Week** flag is correctly set on the ED40. This flag indicates when an employee is regularly scheduled to work in a full-time position less than five days per week. These employees can earn a year of service by working at least four and one-half months, provided that this period includes:

- four (4) full calendar months in which the member renders service and is paid or the member uses paid leave, for at least eight (8) days and an additional five (5) days of service rendered and for which the member is paid or paid leave used in another calendar month or months, but not to include the four (4) full calendar months.

continued on page 5

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Reminders



- **Non-Standard Work Week**

- *Payroll > Utilities > TRS Maintenance > Employee Data (ED) > ED40 (Contract and Position)*
- If an employee is working a non-standard work week, then the **Non-Standard Work Week** checkbox needs to be selected.
- A non-standard work week occurs when the employee is regularly scheduled to work fewer than five days per week.
 - **If your district has a 4-day week or a hybrid of these, then this checkbox will need to be checked on the employee's ED40 record.**
 - Please note it **must be manually marked**.

A screenshot of a web form titled "Contract". It contains three date input fields: "Employment Start Date:", "Contract Begin Date:", and "Contract End Date:". To the right of these fields are two labels: "RE Pays Social Security:" followed by a dropdown menu, and "Non-Standard Work Week:" followed by a checked checkbox. A red rectangle highlights the "Non-Standard Work Week:" label and its checkbox, with a red arrow pointing to the checkbox. The entire form is enclosed in a black border.

Contract

Employment Start Date: RE Pays Social Security:

Contract Begin Date: Non-Standard Work Week: ☒

Contract End Date:

Reminders



- **New TRS Contribution Rates**

- *Payroll > Tables > Tax/Deduction Rates > TRS Rates > 2026*

Contribution Rates for 2025-2026

Rate	Contribution
8.25%	Member Retirement Contribution
0.65%	Member TRS-Care Contribution
0.75%	RE TRS-Care Contribution
8.25%	State Contribution
1.25%	Federal TRS-Care
2%	Public Education Employer Contribution
16.5%	Pension Surcharge
\$535	TRS-Care Surcharge

Tables > Tax/Deductions Payroll

Save

School Year: 2026 Retrieve Delete

CAUTION: Be sure to type the new school year (2026) and click Retrieve before entering the updated rates.

EXEMPTIONS INCOME TAX FICA TAX UNEMPLOYMENT TRS RATES ANNUITY RATES WORKERS' COMP DEDUCTION CD

Delete Print

TRS Rate: 8.25%

TRS Fee: 0.00

TRS Insurance: 0.65% Employer Paid: ☐

District Rate: 8.250%

TRS Care Rate: 1.25%

TRS Care Emplr Contrib: 0.75%

TRS IRS Salary Cap: ~~350,000.00~~ 350,000.00

TRS Non-OASDI Rate: 2.000%

Reminders



- **IRS Salary Cap Provision for 2026**
 - *Payroll > Tables > Tax/Deduction Rates > TRS Rates > 2026*

IRS Salary Cap Provision

Some highly paid members may have their annual creditable compensation limited in accordance with Section 401(a)(17) of the Internal Revenue Code. These limits affect individuals who joined TRS for the first time on or after September 1, 1996. The annual limit is subject to indexing each plan year, based on federal regulations. Amounts excluded from creditable compensation under this law are not subject to member contributions and will not be used in calculating benefits.

Fiscal Year	Salary Cap Amount
FY26	350,000

Reminders

- **UID Staff Extract**

- *Personnel > Utilities > Texas Unique Staff ID Interface*
 - Update **School Year** to **2026** before running Staff ID Export
- Remember to add **Termination Dates** to student workers and temporary employees before extracting Unique IDs.
 - Also, this also serves as a reminder to add a Termination Date to other employees that are not returning to the district for this school year.

Reminders



- **Service Records**

- All leave for 2024-2025 should be entered and posted prior to completing service records.
- All service records should be completed prior to moving NYPR to CYPR.

Reminders



- **Load Employee Benefits file prior to September payroll**
 - *Payroll > Utilities > Employee Benefits Interface*
 - See ASCENDER Help for instructions on how to *Import Annual File*

Import Annual File - HRS8500

Payroll > Utilities > Employee Benefits Interface > Import Annual File

This tab is used to import a text file to create, change, and delete employee deduction records for those deductions that have the **Extract Ded Cd** field populated on the Tables > Tax/Deductions > Deduction Cd tab. Only those records are influenced by the import. The file type is tab-delimited text and must have .txt in the file name.

Reminders



- **Verify State Minimum prior to September payroll**
 - [TEA 2025-2026 Minimum Salary Schedule](#)
 - [IMS Business Announcement](#) sent on 7/31/2025 – **2026 State Minimum Tables**
 - IMS Business Announcement will be sent later this week – **Updated State Min Tables**
 - **Minor change needed:** Table C, Step 5 should be:

208.496	→	208.469 correct
---------	---	---------------------------
 - Can update the specific field manually or can re-import the updated table which will be available on our website when the announcement is sent this week
 - Run a User-Created report using the following parameters:
 - **Employee Number, First Name, Last Name, State Step, and State Minimum Salary** fields
 - Ensure **State Step** and **State Min Salary** amounts are correct

Reminders



- **Teacher Retention Allotment (TRA) & Support Staff Retention Allotment (SSRA)**
 - [TEA Webpage](#) on **House Bill 2**
 - *House Bill 2, Article 1 – Teacher Compensation - [FAQ](#)*
 - [IMS Business Announcement](#) sent on 6/16/2025
 - [IMS Business Announcement](#) sent on 8/20/2025

Reminders

- **New Employees or Job/Position Changes**

- Remember to consider the following for **new** employees:
 - Will receive an email notifying the employee that banking information has changed
 - **Note: This email is sent to the employee any time banking info is added or changed.**
- What to consider for anyone **changing positions**:
 - Are the FICA/Medicare options set correctly?
 - Is the employee eligible for TRS?
 - Is the employee a retiree? If so, is the employee subject to surcharges? Are those surcharges marked?

Reminders



- **Payroll Accrual Variance Extract**

- *Payroll > Utilities > Payroll Accrual Variance Extract*
- **It is recommended to run:**
 - After September payroll
 - Monitor every month
- **Note:** ASCENDER may show errors on the first run where you are asked to update some of the information under *Tax/Deductions* for Calendar Year **2026**. We recommend using 2025 information for now.
 - Remember to update any applicable information prior to the first payroll of the calendar year (January 2026).

Reminders



- **Commodity Codes in Purchasing**

- *ASCENDER Using Commodity Codes [guide](#)*
 - This document will guide you through the necessary steps to set up and use commodity codes in ASCENDER.

Business Guides & Checklists Homepage

Accounts Receivable

Asset Management

Bank Reconciliation

Budget

Finance

Grants and Projects

Payroll

Personnel

Position Management

Purchasing

Warehouse

EmployeePortal

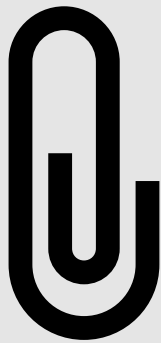
Purchasing

☐ ASCENDER - (CRT) Credit Card Process

☐ ASCENDER - Using Commodity Codes



Reminders



- **Security Administrators**
 - Review users, roles, and permissions in the Security Administration application to ensure that all information is current.
 - The Zoom training was provided earlier in July. The link to this recording is available upon request.

Reminders



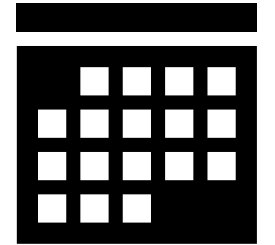
- **Missed the August End of Year workshop?**
 - Go to ASCENDER Help > Business Guides and Checklists for documentation on the processes covered. The guides are also linked below:
 - [End-of-Year Flowchart for September Start LEAs](#)
 - [End-of-Year Payroll Verification](#)
 - [August Accruals](#)
 - [August TRS Reporting](#)
 - [Finance End-of-Year Process](#)
 - [First Payroll of the School Year \(September Start LEAs\)](#)

Reminders



- **ESC-16 ASCENDER Ticket System – Important Reminders**
 - Your district email address is your username.
 - If you forget your password, click the **Forgot your Password?** link on the ticket system login screen to reset it.
 - Reminder: **You cannot respond to the ticket by replying to the email notification for your ticket.**
 - To respond to the ticket, you must click on **View request link** in your email notification for the ticket and log into the ticket system, or you can log into the ticket system, select your ticket and respond there.

Upcoming Trainings



Webinars & In-Person

TEA Student Attendance Accounting Handbook Audit Review (In-Person)

- **September 11th @ 9:00am – 4:00pm**
 - Region 16 ESC, ***Bell Street Location (Lecture Hall)***
 - Session #: [1029850](#)
- **Speakers**
 - Justin Jons
 - Manager of Student Attendance & Financial Compliance Division
 - Joe Herrera
 - Manager of Student Attendance Accounting Handbook & SHARS Financial Compliance Division



2025-2026 IMS Business Trainings

Training

IMS Business

Announcements

Training

Documentation

411 Webinar

Helpful Links

Support



IMS BUSINESS



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

**Subscribe to IMS
Announcements**

**IMS Business Training
Schedule 2025-2026**

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.

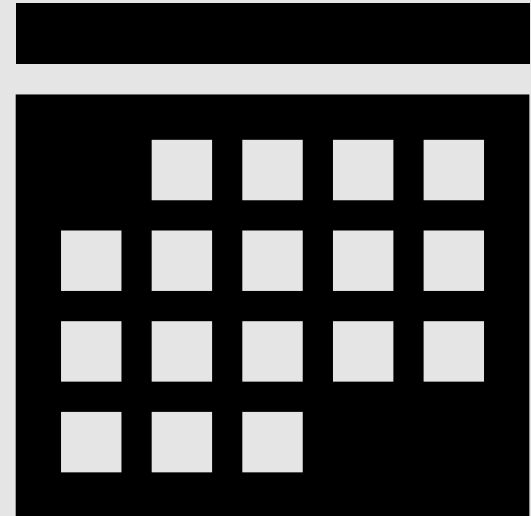
411 webinars are recorded and posted on the IMS Business page.
Other Zoom training courses are recorded and available upon request by completing the Business Training Recording Request Form on the IMS Business Training Page.

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	11/12/25	9:00 AM	11:00 AM	Finance - New User Session 2 (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)
TBD	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)

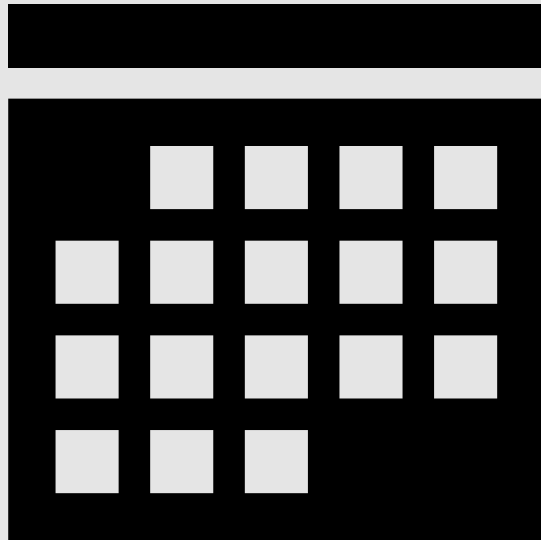
411 Webinars

(Begin at 10:00am)

- **September 24th**
 - Session #: [1031746](#)
- **October 29th**
 - Session #: [1031760](#)
- **November 19th**
 - Session #: [1031771](#)
- **December 17th**
 - Session #: [1031785](#)

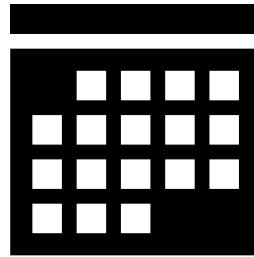


IMS Business Training (Zoom)



- Business – New User Overview
 - **September 25th @ 9:00a-11:00**
 - Session #: [1031749](#)
- Purchasing - New User Overview
 - **September 30th @ 9:00a-11:00**
 - Session #: [1031751](#)

IMS Business Training (Zoom)



- Personnel & Payroll - New User Overview & New Employee Setup
 - **October 27th @ 9:00a-11:00**
 - Session #: [1031752](#)
- Payroll Processing for New Users
 - **October 27th @ 1:30p-3:30**
 - Session #: [1031756](#)
- TRS Reporting Process for New Users
 - **October 28th @ 9:00a-11:00**
 - Session #: [1031759](#)

2026 ASCENDER Business Conference

- **June 23-25, 2026**

- Will be held in San Antonio, Texas
- Early Bird Registration will open September 1, 2025 for \$300
- Sessions are presented by ASCENDER consultants from around the state
- This user conference will be business only



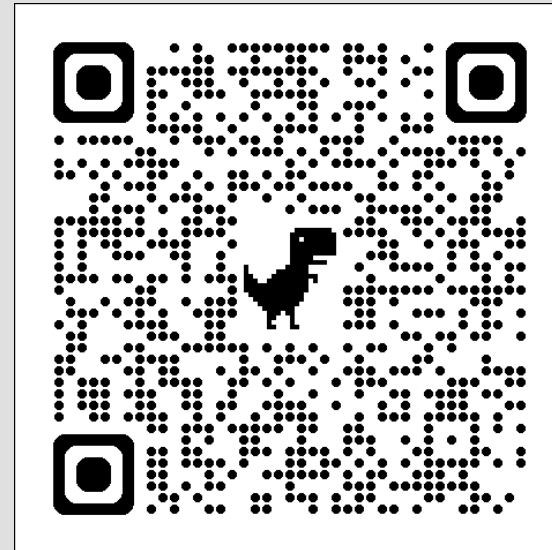
Thank you
for attending!

Need assistance?

Please enter an ESC 16-ASCENDER Ticket [here](#).

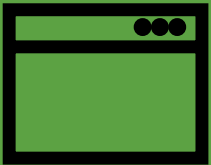
This link can be found on all areas (Business, Student, TSDS/PEIMS pages) of the IMS website as well.

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



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

Helpful Links



- **End of Fiscal School Year Help Documentation:**
 - [End-of-Year Payroll Verification](#)
 - [August Accruals](#)
 - [August TRS Reporting Process](#)
 - [Finance End of Year Process](#)
 - [First Payroll of the School Year](#)
- [June TRS Update](#) and [July TRS Update](#) (*August TRS Update not yet available as of 8/27/25*)
- **Register for Trainings:** [IMS Business Trainings](#)
- **Subscribe to Announcements:** [IMS Announcements](#)
- **New District Employee/Position Change Information** [Form](#)