

# 411 Webinar

February 18, 2026



# ASCENDER Updates



## **ASCENDER Releases:**

*Recent Update 11.0600 installed on 2/5/2026*

# Personnel

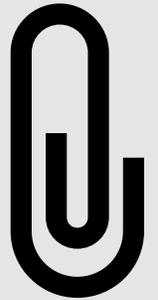
- **Personnel > Reports > Payroll Information Reports > HRS5250 - 1095-B Forms**
  - Per IRS requirements, updated the 1095-B AIR file to support the 2025 tax year.
- **Personnel > Reports > Payroll Information Reports > HRS5255 - 1095-C Forms**
  - Per IRS requirements, updated the 1095-C AIR file to support the 2025 tax year.

# EmployeePortal

- **Forgot Password**
  - Modified the program to eliminate extra spaces when copying the temporary password from the email.



# Reminders



Things to Remember

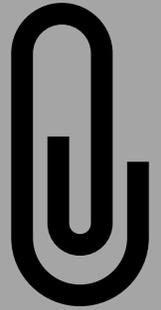
# Reminders



- **TSDS Class Roster Winter Collection**
  - Class Roster Winter Snapshot Date: **February 27, 2026**
  - Class Roster Winter Submission Due Date to TEA: **March 26, 2026**

# Reminders

## *Class Roster Winter Submission*



- **Important Personnel Fields to Review**

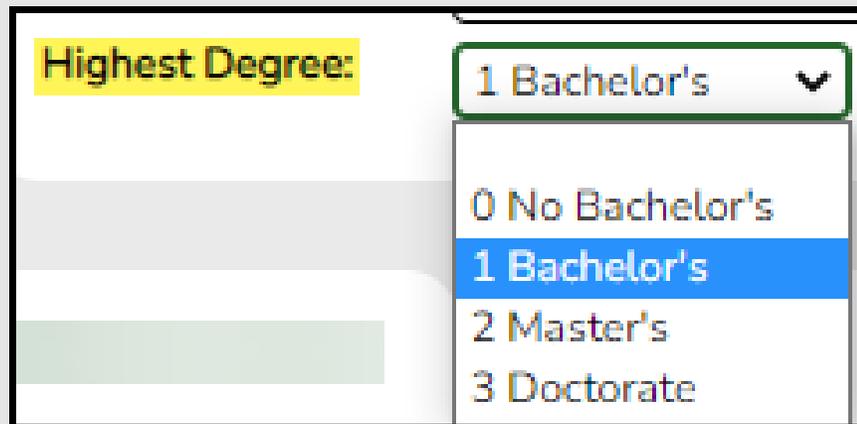
- Highest Degree
- Prior Teaching Experience
- Creditable Year of Service Indicator
- Teacher Incentive Allotment Designation Codes

# Reminders

## *Class Roster Winter Submission*

- **Highest Degree**

- *Personnel > Maintenance > Employment Info*

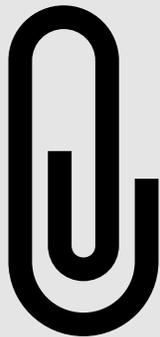


The image shows a screenshot of a web application interface. On the left, there is a label 'Highest Degree:' highlighted in yellow. To its right is a dropdown menu. The menu is currently open, showing a list of options: '1 Bachelor's' (with a downward arrow), '0 No Bachelor's', '1 Bachelor's' (highlighted in blue), '2 Master's', and '3 Doctorate'.

- Identifies the highest post-secondary degree a person has earned from an institution recognized as accredited by the Agency.

# Reminders

*Class Roster Winter  
Submission*



- **Prior Teaching Experience**

- *Personnel > Maintenance > Employment Info*

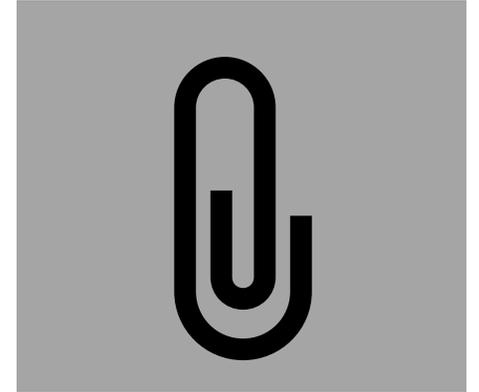
Prior Teaching:

23

- The total number of years that the employee has previously held a teaching position in one or more educational institutions.

# Reminders

## *Class Roster Winter Submission*



- **Creditable Year of Service Indicator**

- *Personnel > Maintenance > Employment Info*

Creditable Year of Service:

- Select to indicate that the employee is a teacher who currently qualifies for the Teacher Incentive Allotment or has been submitted by the LEA for a new or change of designation, and has been employed by the LEA and compensated or will be compensated by the LEA for a creditable year of service.

- TEA defines a creditable year of service as 90 days at 100% of the day (equivalent to four and one-half months or a full semester) or 180 days required at 50-99% of the day and compensated for that employment.

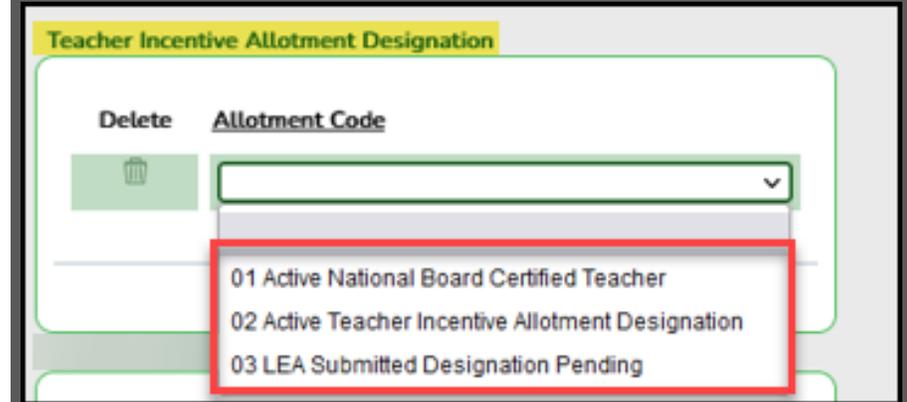
# Reminders

## *Class Roster Winter Submission*

- **Teacher Incentive Allotment Designation**
  - *Personnel > Maintenance > Staff Demo > Credentials*

Click ▼ to select the appropriate teacher (ROLE-ID 087) allotment code.

- **01 Active National Board Certified Teacher** - Indicates that the teacher is an Active National Board Certified Teacher.
- **02 Active Teacher Incentive Allotment Designation** - Indicates that the teacher holds a current designation (Recognized, Exemplary, or Master).
- **03 LEA Submitted Designation Pending** - Indicates that the teacher has been submitted by an LEA for a new or change of designation in the Teacher Incentive Allotment.



The screenshot shows a web interface titled "Teacher Incentive Allotment Designation". It features a "Delete" button with a trash icon and a dropdown menu labeled "Allotment Code". The dropdown menu is open, showing three options: "01 Active National Board Certified Teacher", "02 Active Teacher Incentive Allotment Designation", and "03 LEA Submitted Designation Pending". A red box highlights the dropdown menu options.

- Multiple allotment codes may be added (if needed).

# Reminders

## *Class Roster Winter Submission*



- **Reports to Review:**

- *Personnel > Reports > User Created Reports*
  - *Under Employment:*
    - **Highest Degree Achieved**
    - **Yrs Prior Teaching**
    - **Creditable Year of Service**
- *Personnel > Reports > Personnel Reports*
  - **HRS1750 – Teacher Incentive Allotment Designation Report**
- *TSDS Reports*
  - **TSDS Class Roster Staff Roster (CLS2-100-005)**
  - **TSDS Class Roster Teacher Incentive Allotment Designated Staff (CLS2-100-007)**

# Reminders

## *Class Roster Winter Submission*



- **TSDS Class Roster Staff Roster (CLS2-100-005)**
  - *Report Example*

Staff Name	Unique ID	Staff ID	Sex	Ethnicity/Race	Date of Birth	Staff Type	Highest Degree	PY Teach Exp	Creditable Years of Service	TIA Designation Code Description
			M	W	03/27/1981	1	Bachelor's	20	Y	
			F	W	11/29/1989	1	Bachelor's	11	Y	Active Teacher Incentive Allotment Designation LEA Submitted Designation Pending
			F	W	01/23/1977	1	Bachelor's	5	Y	Active Teacher Incentive Allotment Designation
			F	W	07/19/1969	1	Bachelor's	20	Y	Active Teacher Incentive Allotment Designation
			F	W	07/02/1980	1	Bachelor's	6	Y	Active Teacher Incentive Allotment Designation
			M	W	03/05/1976	1	Bachelor's	22	Y	
			F	W	09/27/1964	1	Bachelor's	27	Y	LEA Submitted Designation Pending
			F	W	10/01/1997	1	Bachelor's	1	Y	
			F	W	01/14/1980	1	Master's	17	Y	Active Teacher Incentive Allotment Designation LEA Submitted Designation Pending

# Reminders

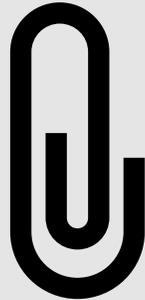
## *Class Roster Winter Submission*



- **TSDS Class Roster Teacher Incentive Allotment Designated Staff (CLS2-100-007)**
  - *Report Example*

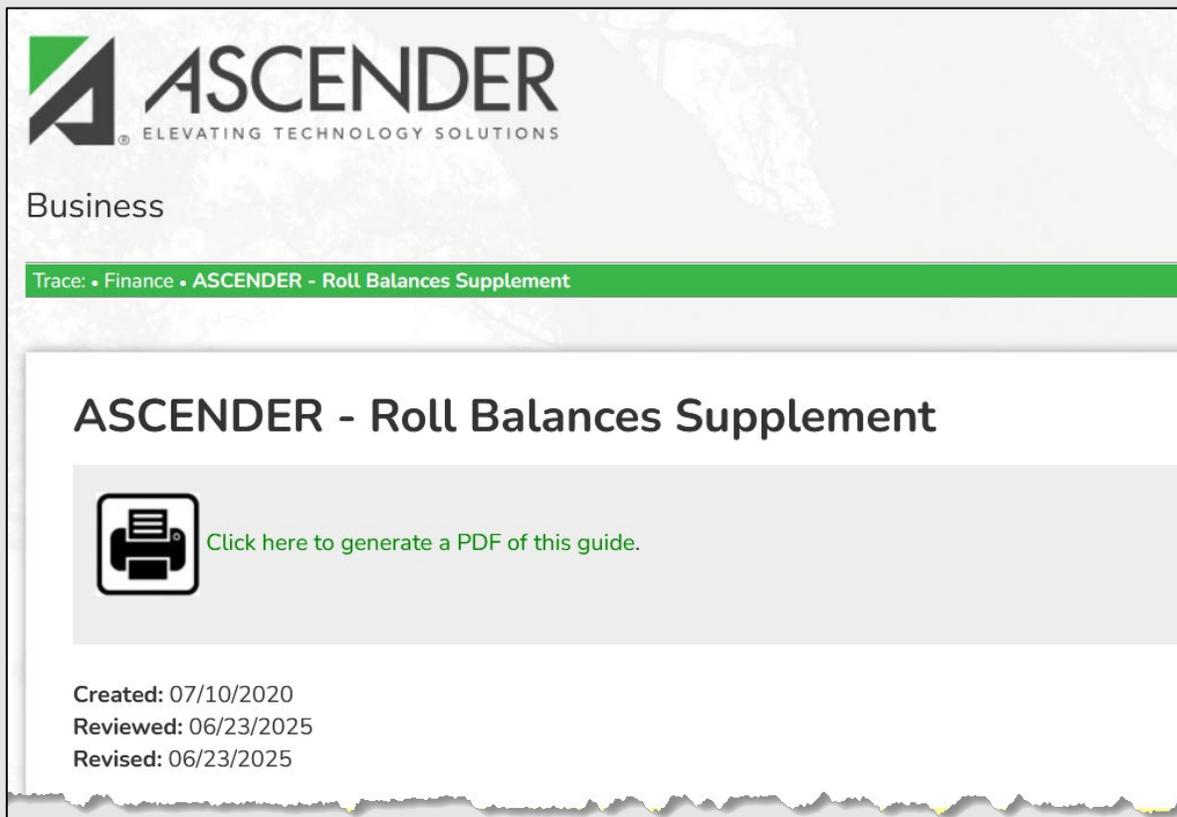
Staff Name	Unique ID	Staff ID	Sex	Ethnicity/Race	DOB	Creditable Years of Service	TIA Designation Code Description
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Y	
Provides Instruction at Campus ID(s): [REDACTED] 101							
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Y	
Provides Instruction at Campus ID(s): [REDACTED] 001, [REDACTED] 041							

# Reminders



- **FY2025 Annual Financial Report Submission (AFR)**
  - The FY2025 annual financial report (AFR) due date for **all** FY2025 annual financial reports to be completed, approved by the board, and submitted to the Texas Education Agency is **February 27, 2026.**
  - Users will need to apply for access to the new Audit 2.0 application in TEAL.
  - [Link](#) to TEA – Financial Compliance/Electronic Submissions

# Reminders

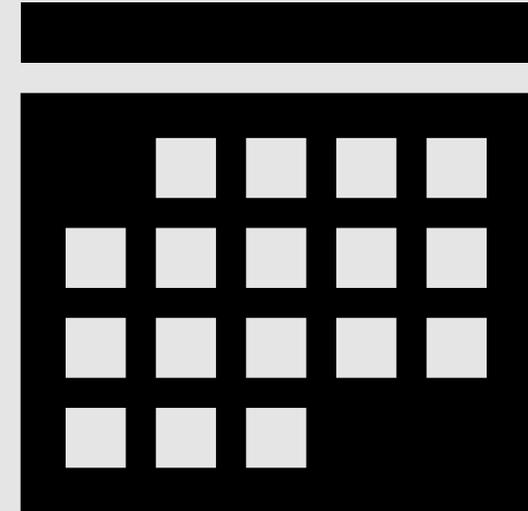


The screenshot shows the ASCENDER logo at the top left, with the tagline 'ELEVATING TECHNOLOGY SOLUTIONS'. Below the logo is the word 'Business'. A green breadcrumb trail reads 'Trace: • Finance • ASCENDER - Roll Balances Supplement'. The main heading is 'ASCENDER - Roll Balances Supplement'. Below this is a printer icon and a link that says 'Click here to generate a PDF of this guide.' At the bottom, the page metadata is listed: 'Created: 07/10/2020', 'Reviewed: 06/23/2025', and 'Revised: 06/23/2025'.

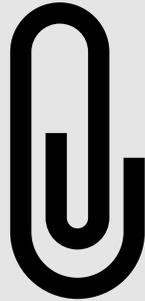
- **Roll Balances Supplement**
  - ASCENDER Help > Business Guides and Checklists > Finance > Roll Balances Supplement

# Reminders

- **1095 Forms**
  - 1095 Processing Training (**Recording available**)
  - *IMS Business website > Documentation > Payroll/Personnel > Year End – Calendar > Process 1095 Forms*
  - [ASCENDER Help Guide](#)
  - Districts are now able to process and print the 1095 forms and create the submission files.
- **Due Dates for 1095 Forms:**
  - Due Date to Recipients: **March 2<sup>nd</sup>**
  - Due Date to IRS: **March 31<sup>st</sup> (E-file)**



# Reminders



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

*Reporting Employers*

**UPDATE**

TEACHER RETIREMENT SYSTEM of TEXAS

# Reminders



## Website & IMS Business Login

- Username: imsbusiness
- Password: busims16ESC!

The screenshot displays the website for Region 16 Education Service Center. At the top left is the logo with the text "REGION 16 Education Service Center" and the slogan "Serve. Lead. Ignite." with a stylized flame icon. To the right of the logo is a "Select Language" dropdown menu, a search bar labeled "Search this site", and a Facebook icon. Below these are buttons for "Join Our Mailing List" and "ESC Staff Only". A dark blue navigation bar contains links for "About Us", "Employment", "School Support and Academic Services", "School Services", "Business Services", and "Superintendent Resources". The main content area features a breadcrumb trail "IMS Business » IMS Business" and a large heading "IMS Business". On the left is a vertical menu with links: "IMS Business", "Announcements", "Training", "Documentation", "411 Webinar", "Helpful Links", and "Support". Below this menu is an orange button that says "Subscribe to IMS Announcements". To the right of the menu is a large banner with the "IMS BUSINESS" logo and the Region 16 logo. Below the banner are four buttons: "IMS Home", "IMS Business", "IMS Student", and "IMS TSDS". At the bottom right is a circular logo for the "ASCENDER TICKET SYSTEM" with the "ASCENDER" logo in the center and "ESC-16" at the bottom.

# 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



Subscribe to IMS  
Announcements

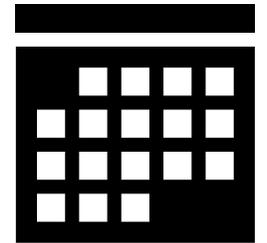
IMS Business Training  
Schedule 2025-2026

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

# Upcoming Trainings



Webinars & In-Person

# 2025-2026 IMS Business Trainings

IMS Business » Trainings/ Recordings

## Trainings/ Recordings

IMS Business

Announcements

Documentation

Trainings/ Recordings

411 Webinar

Helpful Links

Support

Subscribe to IMS  
Announcements

IMS Business Training  
Schedule 2025-2026

New District Employee  
Form



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

### Available Training Recordings for the 2025-2026 School Year

Date	IMS Business Training
02/03/2026	ASCENDER Business - 1095 Processing (Zoom)
01/07/2026	ASCENDER Business - 1099 Processing (Zoom)
07/2026	ASCENDER Business - W-2 Processing (Zoom)



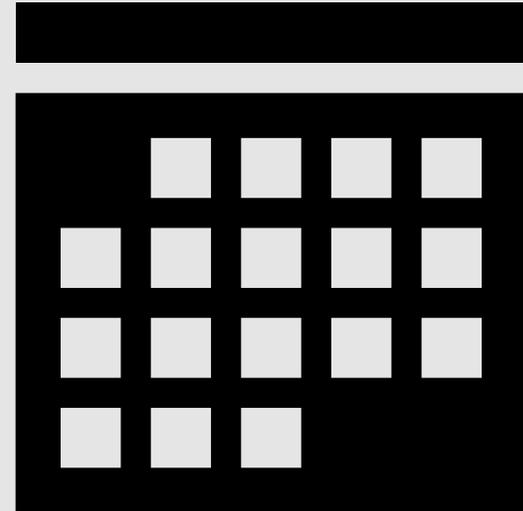
## IMS ASCENDER Business Trainings September 2025 - August 2026

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.

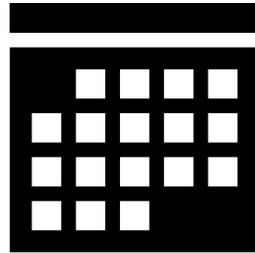
Session #	Date	Start	End	IMS Business Trainings
<a href="#">1029850</a>	9/11/25	9:00 AM	4:00 PM	TEA Student Attendance Accounting Handbook Review
<a href="#">1031746</a>	9/24/25	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
<a href="#">1031749</a>	9/25/25	9:00 AM	11:00 AM	Business - New User Overview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

# 411 Webinars (10:00am)

- **March 25<sup>th</sup>**
  - Session #: [1031825](#)
- **April 29<sup>th</sup>**
  - Session #: [1031837](#)
- **May 20<sup>th</sup>**
  - Session #: [1031849](#)

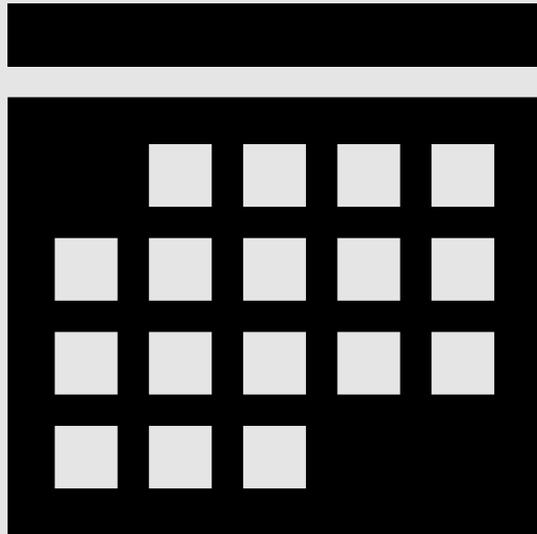


# IMS Business Training (In-Person)



- Budget Process & Next Year Payroll Process
  - **March 4<sup>th</sup> from 9:00am-4:00pm**
    - Session #: [1031828](#)
    - **In-person @ ESC 16 Bell St. in High Plains Room**

# IMS Business Training (Webinar)



- Tips, Tricks & Reminders for Business Users
  - April 9<sup>th</sup> @ 9:00a-11:00
  - Session #: [1031854](#)

# 2026 ASCENDER Business Conference

## "Taking Care of Business, The ASCENDER Way"

- **June 23-25, 2026**

- Will be held in San Antonio, Texas
- Conference Registration: \$300
- Sessions are presented by ASCENDER consultants from around the state
- This user conference will be business only
- Region 20 ESC Session #: [110391](#)

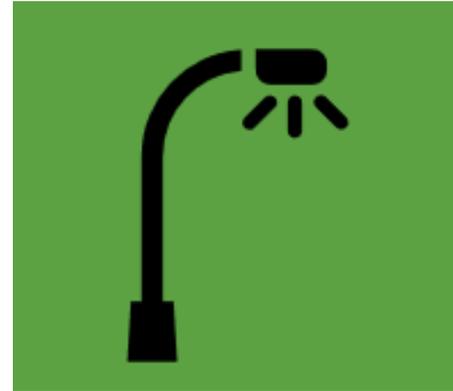


# Spotlight

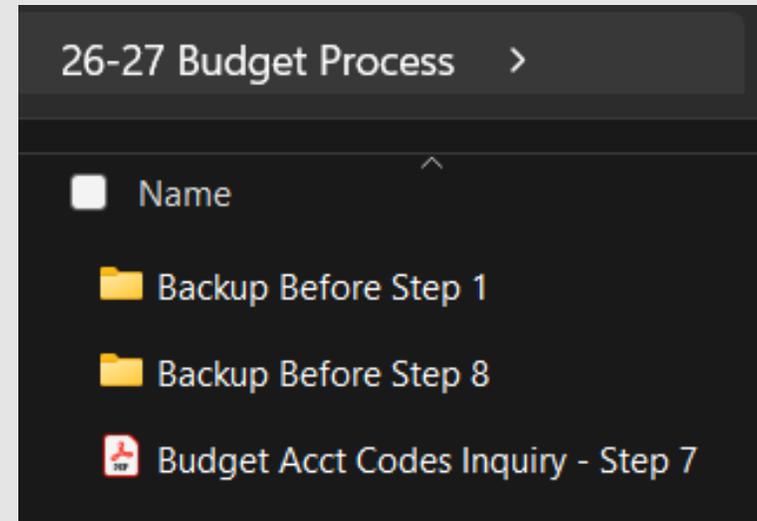
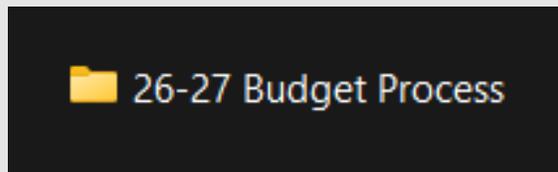
**Budget Process Reminders**



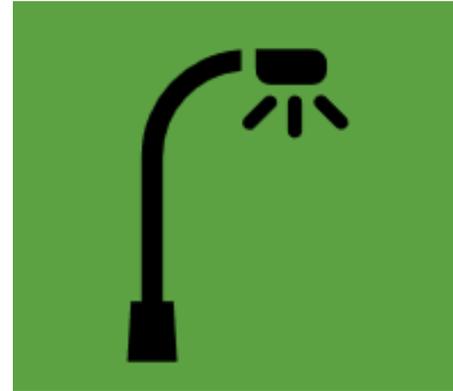
# Budget Process



- Create a folder on your computer to where you can save all information including exports and reports generated through working on the Budget Process.
- For example:



# Budget Process



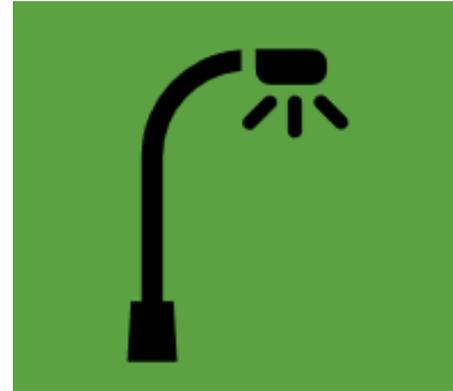
- It is recommended to create exports throughout the process to be able to set data back (*if needed*).
  - It is suggested to run exports before starting key steps.
    - Ex. Step 1, before Step 8, etc.
    - Reminder: Do NOT rename the export or it can corrupt the file.
- Review items in the **Before You Begin** section and update data as needed to avoid errors during PEIMS submissions and for other required reporting.

# Budget Process



- Compare funds listed in Finance for 24-25 (File ID 5) to funds listed in Budget (File ID N) to determine if all necessary funds have been added to both applications.
  - They can be compared by reviewing the *Fund* data in **File ID 5** in *Finance > Tables > Account Codes* vs. the data in *Budget > Tables > Account Codes > Fund*.
- **Step 2 – Update Budget Data**
  - Update all funds that already exist in Budget and add any new 2024-2025 funds that were added in Finance but are not listed in the fund table in *Budget > Tables > Account Codes > Fund* screen.

# Budget Process



- **Step 2 – Update Budget Data**
  - Make sure that you click *Retrieve* once you have chosen File ID 5 in the ‘*From GL File ID*’.
  - Once you click *Execute*, an error report may display. If so, the report will display the portions of account codes that don’t exist in Budget. If this occurs, the missing parts of the account codes will need to be added to the Budget before restarting this step.
- **Step 3 - Compare Budget and Finance Account Code Amounts**
  - Review info - important for reference point when looking at historical data.
- **Step 5 (if applicable) - When Deleting Funds, verify the File ID you’re in before starting this step.**

# Budget Process



- Step 6 – **Copy the Current Year Budget**
  - Be sure to *Select All* to move all information (not shown in screenshot). After completing, save and/or print a copy of the Budget Inquiry of File ID 6.
- Step 7 – **Update Budget Options**, depending on the budget level you're working on, the data you see may not include all codes
  - (ex. Requested does NOT show 61XX accounts).
- Before starting Step 8, make sure to print and/or save a copy of the **Budget Account Codes Inquiry** to have available for reference.
- Step 8 - **Reinitialize the Budget** should only be done once. If issues are found when performing this step, please do not proceed.

# Budget Process



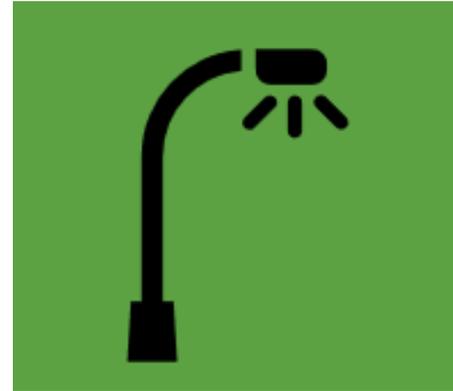
- Be sure to verify that data is updated (headings and amounts have moved/changed) after the Step 8 – **Reinitialize the Budget** is complete.
- On Step 9 - **Verify the Budget Reinitialization Results**, be sure to reference the Budget Account Codes Inquiry report generated on step 7.
- Keep in mind that the fiscal year in the account code will not update until Step 10 – **Update Fiscal Year** had been processed.
- Step 12 – **Clear or Move Next Year Requisitions** – If your LEA utilizes the Next Year Requisitions feature, be sure that you process this step.
- If you use simulations and want to keep ones that were created in the past, skip Step 13 – **Clear Budget Tables**.

# Budget Process



- Step 14 – **Update Budget Data** is a step that is performed often (at least once a month) to continue to update amounts in the Budget application from Finance.
- Step 15 – **Perform Update Budget Data Comparison** – be sure to verify the specified columns updated appropriately.
- **Budget Maintenance** can be done by utilizing either of the following options:
  - Creating and Posting Simulations (**Steps 16 and 17**)
  - Manually entering in amounts and account codes in Budget Data screens (**Step 18**)
  - Updating amounts only in Budget Data – Quick Entry screens (**Step 18**)

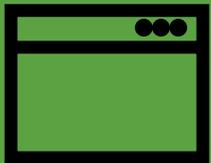
# Budget Process



- Step 18 – **Perform Next Year Budget Data Maintenance** - If needing to change a piece of an account code, it is suggested to add it as a new line item to have the historical data reflected for the prior account code.
- Steps 19 and 20 – **Deleting Funds** and **Deleting Prior Fund/Fiscal Years** – If you have account codes that continue showing up from year to year but the account codes are no longer being utilized, you can delete them on this step here.
  - Please note that historical budget data for these codes will also be deleted if you do this.
- Step 21 – **Copy Level – Budget Level Processing** – To ensure that all data is seen for final budget information, verify that data has appropriately been moved to the Approved level.

# Helpful Links

- February TRS Update – not yet avail. as of Feb 8<sup>th</sup>
  - [Link](#) for TRS Updates webpage
- [Process 1095 Forms Guide](#) (Revised 12/12/25)
- [Budget Process Guide](#) (Revised 1/30/26)
- [Class Roster Winter Submission Guide](#)
- [Submit a TIMS Ticket for TSDS/PEIMS Assistance](#)
  - For TSDS Coordinators, with Login Credentials
- 25-26 IMS Business Trainings [Link](#)
- **Submit a support request via** [ESC-16 ASCENDER Ticket System](#)
- **Subscribe to** [IMS Announcements](#)
- **Submit a** [New Employee Form](#)



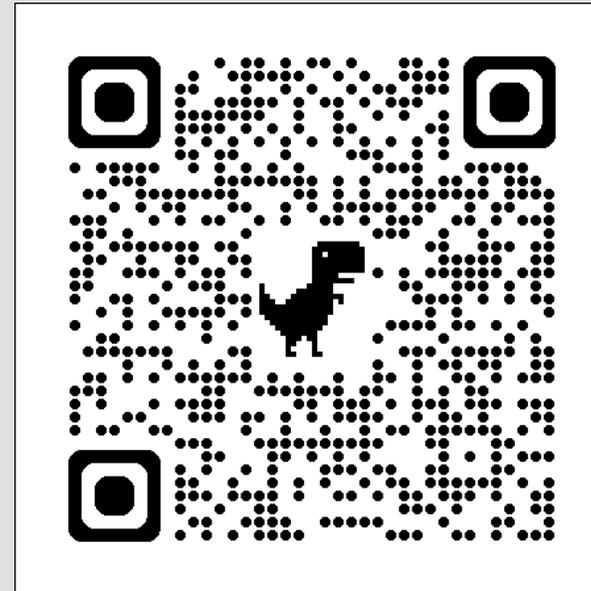
Thank you  
for attending!

## 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.



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