

411 Webinar

March 25, 2026



ASCENDER Updates



ASCENDER Releases:

Recent Update 11.0700 installed on 3/05/2026

General ASCENDER Updates

- Changed the program as follows to meet NACHA ACH file requirements:
 - Modified the Finance EFT File to change the Company Entry Description from FINANCE to **PURCHASE**. The Finance Pre-Note file was not modified.
 - Modified the Grants and Projects EFT File to change the Company Entry Description from FINANCE to **PURCHASE**. Grants and Projects does not have a Pre-Note file.
 - The Payroll EFT and Pre-Note files were not modified as the current Company Entry Description (**PAYROLL**) is accurate.
- In addition, the program was updated to include the LEA's county-district number (**CCDDDD**) along with the date in all **EFT** and **Pre-Note** file names.

Payroll

- **Payroll > Payroll Processing > Run Payroll**
 - Corrected the Payroll Calculations display issue that occurred in the Firefox browser.
- **Payroll > Reports > Year To Date Reports > HRS3200 - YTD Payroll Earnings Register**
 - Added the **W2 Reportable Overtime** column and included it in all generated totals for employee, campus, and district.

Personnel

- **Personnel > Maintenance > Staff Demo > Demographic Information**
 - Added the **Extract for UID Resub** checkbox to resubmit employee information to TEA after a **Texas Unique Staff ID** has already been entered in ASCENDER.
 - After resubmission, “Submitted to TEA” is displayed next to the checkbox. The **Extract for UID Resub** checkbox and message are cleared after the *Personnel > Utilities > Texas Unique Staff ID Interface > Import* is processed.

Personnel

- Personnel > Maintenance > Staff Demo > Demographic Information

The screenshot shows a web application interface for personnel management. At the top, there is a green navigation bar with a dropdown arrow and the text "Personnel" next to a grid icon. Below this is a white bar containing a "Save" button. The main content area has a light green background and contains an "Employee:" label followed by a text input field containing "000420". To the right of the input field are four buttons: "Retrieve", "Directory", "Add Emp", and "TSDS Unique ID". Below these buttons is a horizontal menu with six tabs: "DEMOGRAPHIC INFORMATION" (which is underlined in green), "CREDENTIALS", "VERIFICATION", "INSURANCE", "SERVICE RECORD", and "RESPONSIBILITY". At the bottom of the form, there are two input fields: "Staff ID/SSN:" and "Texas Unique Staff ID:". To the right of these fields is a yellow button labeled "Extract for UID Resub" with a checked checkbox and the text "Submitted to TEA". Further to the right is the text "Last Change:" followed by a blurred input field.

Personnel

- **Personnel > Utilities > Texas Unique Staff ID Interface > Extract**
 - Modified the extract to properly handle the new **Extract for UID Resub** checkbox on the *Maintenance > Staff Demo > Demographic Information* tab. If the checkbox is selected on the Staff Demo tab, the extract will submit the information to TEA. After the process is completed, the Texas Unique Staff ID Resubmission Extract column will be set to **S** in the system indicating the information has been submitted.

Personnel

- **Personnel > Utilities > Texas Unique Staff ID Interface > Extract**
 - Added the **UID Resub** column to the Texas Unique Staff ID Export Report. This checkbox will be selected on the report if the Extract is run with the new **Extract for UID Resub** checkbox selected on the *Maintenance > Staff Demo* tab. After the Import is done, the checkmark is cleared.
- **Personnel > Utilities > Texas Unique Staff ID Interface > Import**
 - Modified the import to clear the **Extract for UID Resub** checkbox selection after the import is processed.

Personnel

- Personnel > Utilities > Texas Unique Staff ID Interface > Extract

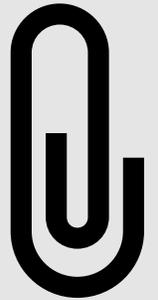
Date Run:		Texas Unique Staff ID Export Report										Page: 1 of 1	
Cnty Dist:													
Emp Nbr	Employee Name	Maiden Name	DOB	Gender	Staff ID	Hispani c /Latino	Race 1	Race 2	Race 3	Race 4	Race 5	UID Resub	
001497						<input checked="" type="checkbox"/>	W					<input type="checkbox"/>	
000013						<input checked="" type="checkbox"/>	W					<input checked="" type="checkbox"/>	
001528						<input checked="" type="checkbox"/>	W					<input type="checkbox"/>	
000807						<input checked="" type="checkbox"/>	W					<input type="checkbox"/>	
001533						<input checked="" type="checkbox"/>	W					<input type="checkbox"/>	

End of Report

Personnel

- **Personnel > Maintenance > Employment Info**
 - Corrected the issue that caused the **Pct Day Employed Effective Date** to be disabled and display 00-00-0000 instead of the most current begin date with no end date from the TSDS Days Employed Set.

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



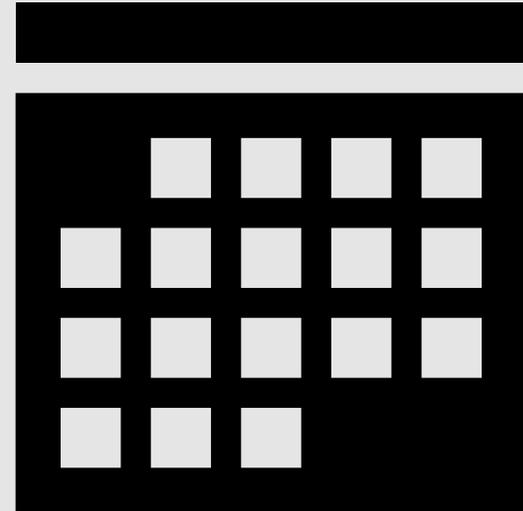
Important Personnel Fields to Review

- Staff UID
- Highest Degree Level
- Prior Year Teaching Experience
- Creditable Year of Service Indicator Code
- Teacher Incentive Allotment Designation Code

- **These items were reviewed in detail during the February 411.**

Reminders

- **Due Dates for 1095 Forms:**
 - Due Date to Recipients: **March 2nd**
 - Due Date to IRS: **March 31st (E-file)**



Reminders



- **Quarterly Reports for 1st Quarter (January - March)**
 - 941 and Unemployment reports
 - Due on or before April 30th

When To File Form 941

Your Form 941 is due by the last day of the month that follows the end of the quarter.

The Quarter Includes . . .	Quarter Ends	Form 941 Is Due
1. January, February, March	March 31	April 30
2. April, May, June	June 30	July 31
3. July, August, September	September 30	October 31
4. October, November, December	December 31	January 31

Reminders



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

Reporting Employers

UPDATE

TEACHER RETIREMENT SYSTEM of TEXAS

Reminders



- **February 411 Webinar**
 - Class Roster Winter Submission Reminders
 - Budget Process Reminders

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 shows the breadcrumb "IMS Business » IMS Business" and the heading "IMS Business". On the left is a vertical menu with items: "IMS Business", "Announcements", "Training", "Documentation", "411 Webinar", "Helpful Links", and "Support". Below the menu is an orange button that says "Subscribe to IMS Announcements". On the right 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 "ASCENDER" and "ESC-16" in the center.

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

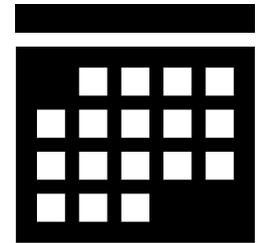
IMS Business Training
Schedule 2025-2026

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



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
02/10/2026	ASCENDER Credit Card Reconciliation (Zoom)
02/10/2026	ASCENDER Bank Reconciliation (Zoom)
02/03/2026	ASCENDER Business - 1095 Processing (Zoom)

Subscribe to IMS Announcements

IMS Business Training Schedule 2025-2026

New District Employee Form



IMS ASCENDER Business Trainings September 2025 - August 2026

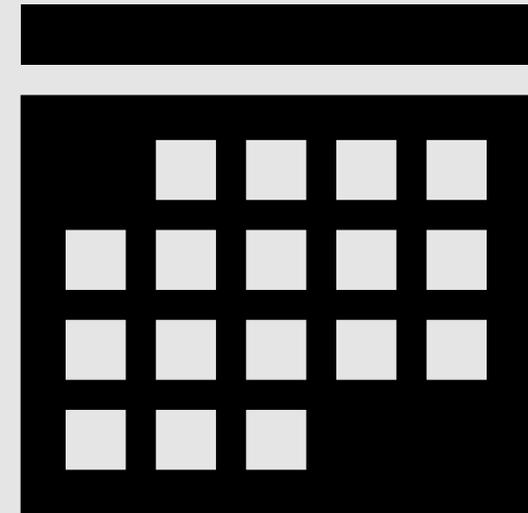
Registration links for trainings are linked in the Session # column found below. Click the link and follow steps to complete the registration process. 411 webinars are recorded and posted on the IMS Business page.

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

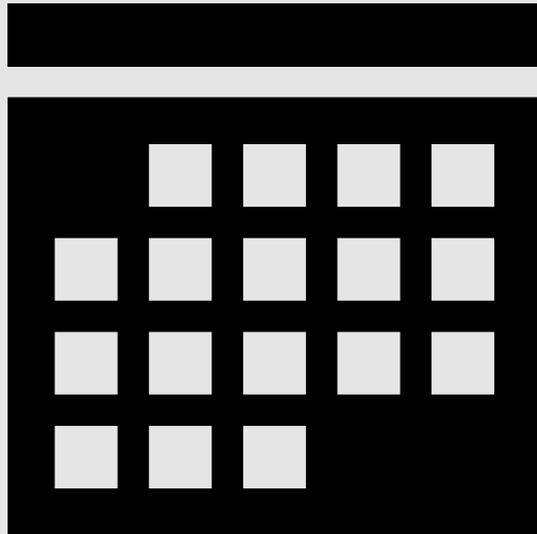
Session #	Date	Start	End	IMS Business Trainings
1029850	9/11/25	9:00 AM	4:00 PM	TEA Student Attendance Accounting Handbook Review
1031746	9/24/25	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
1031749	9/25/25	9:00 AM	11:00 AM	Business - New User Overview (Zoom)
1031751	9/30/25	9:00 AM	11:00 AM	Purchasing - 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)
1031785	12/17/25	10:00 AM	12:00 PM	Monthly 411 Webinar (Zoom)
1031780	1/7/26	9:00 AM	11:00 AM	W-2 Processing (Zoom)
1031782	1/7/26	1:30 PM	3:30 PM	1099 Processing (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)
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)
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)

411 Webinars (10:00am)

- **April 29th**
 - Session #: [1031837](#)
- **May 20th**
 - Session #: [1031849](#)
- **August 26th**
 - Session #: [1031852](#)



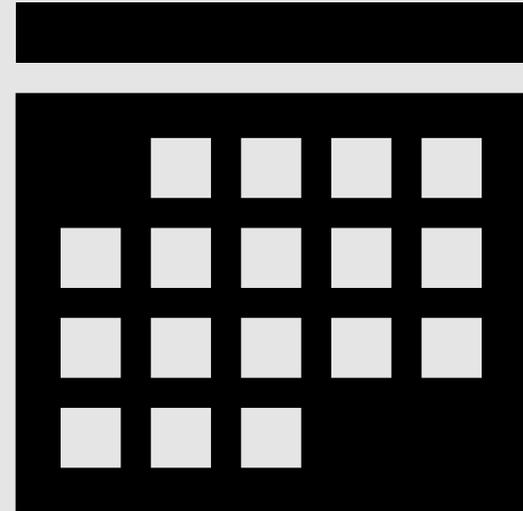
IMS Business Trainings (Zoom)



- Tips, Tricks & Reminders for Business Users
 - April 9th @ 9:00a-11:00
 - Session #: [1031854](#)
- Creating Service Records
 - May 21st @ 9:00a-11:00
 - Session #: [1031863](#)

Upcoming TSDS Training (In-Person)

- TSDS/PEIMS Summer Review
 - **April 30th @ 9:00am-4:00pm**
 - Session #: TBD
 - Lecture Hall – Bell Street Location





TASBO Certification Courses

Location: Region 16 ESC

Time: 9:00am-4:00pm

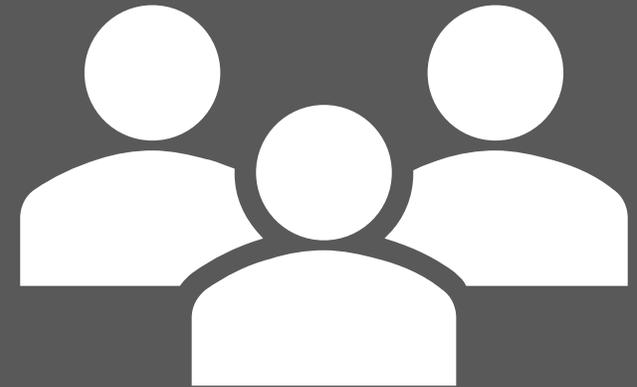
- **April 21, 2026**
 - [MAO201](#) Planning and Administering School Construction Projects
 - [MGT317](#) Financial Essentials
- **April 22, 2026**
 - [PUR204](#) Construction Purchasing Law

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

**Next Year Payroll Process
(Overview and Reminders)**



Business Guides and Checklists – Next Year Payroll Process

ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS

Search

Business

Trace: • HRS3000 - Calendar Year To Date Report • Budget • **ASCENDER Business Guides & Checklists Homepage**

how_to_guides

Table of Contents

- ASCENDER Online Help
 - Helpful Tips
 - Browser Settings
 - Document Attachments
 - ASCENDER Business Guides & Checklists**
 - Printable Help
- Accounts Receivable
- Asset Management
- Bank Reconciliation
- Budget
- Finance
- Grants And Projects
- Payroll
- Personnel
- Position Management
- Purchasing
- Warehouse

ASCENDER Business Guides & Checklists Homepage

Welcome to the ASCENDER Business Guides & Checklists Homepage. Select an application tab to view a list of guides & checklists for that application, if available.

*If CRT is listed in the document title, the document was created with the assistance of a Consultant Resource Team (CRT). A Consultant Resource Team includes approximately five regional ESC consultants from across the state.

Accounts Receivable Asset Management Bank Reconciliation Budget Finance
Grants and Projects Payroll Personnel Position Management Purchasing Warehouse
EmployeePortal

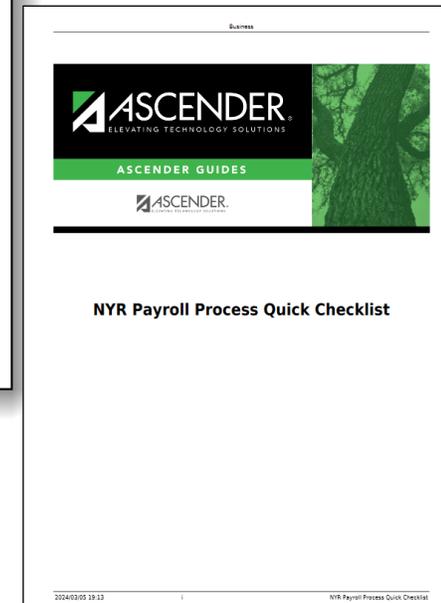
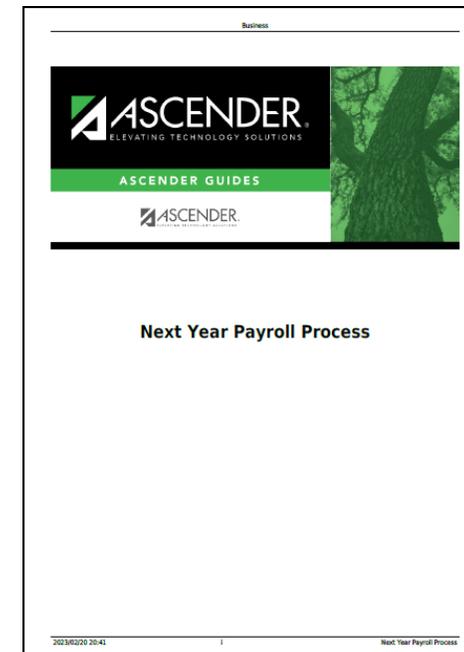
Business Guides and Checklists – Next Year Payroll Process

Accounts Receivable Asset Management Bank Reconciliation Budget Finance Grants and Proje **1** Payroll

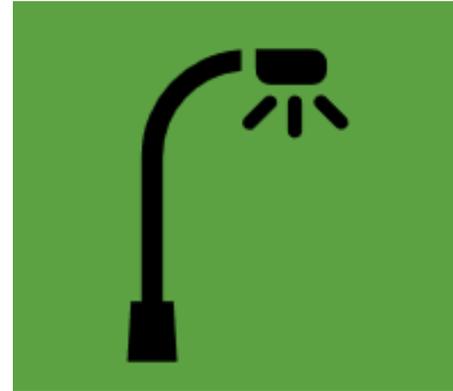
Personnel Position Management Purchasing Warehouse EmployeePortal

Payroll

- ASCENDER - (CRT) New Employee Setup
- ASCENDER - (CRT) August Accruals
- ASCENDER - (CRT) End-of-Year Accruals for June Year-End LEAs
- ASCENDER - (CRT) End-of-Year Payroll Verification
- ASCENDER - (CRT) First Payroll of the School Year
- ASCENDER - (CRT) First Payroll of the School Year (July Start LEAs)
- ASCENDER - (CRT) Next Year Payroll Process **2**
 - (CRT) Next Year Payroll Process Quick Checklist **3**



Next Year Payroll Process



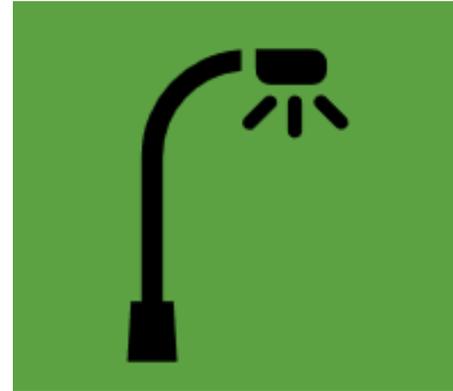
- The purpose of the Next Year Payroll Process document is to guide you through the necessary steps to create next year's payroll. This process includes updating tables and employee information, calculating salaries, performing edits, and interfacing payroll to Budget.
- This process occurs in the next year and does not interfere with the current year processing.

Next Year Payroll Process



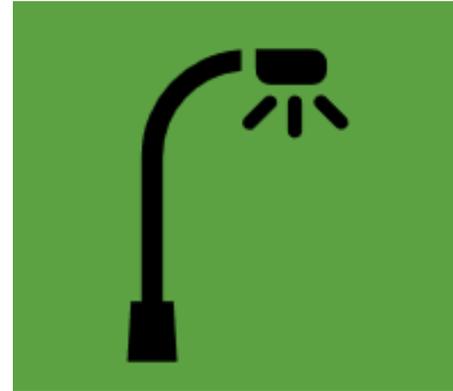
- **Things to Remember Prior to Beginning NYPR:**
 - Ensure open communication exists between the payroll office and the business office.
 - Verify that the Budget process is complete and the budget is open.
 - Discuss/Set potential deadlines
 - Verify that you are logged on to the current pay frequency when beginning this process.
 - **Remember:** Next Year calculations and distributions are validated to the new budget (N). Make sure that the fiscal year on the distribution pages match what is in the new budget (N). If it changes during the process, perform a mass update.

Next Year Payroll Process



- The following pages are **shared** between the current year and next year. Use **caution** when updating these pages in the next year:
 - *Personnel or Payroll > Tables > District HR Options*
 - *Personnel > Tables > Credential*
 - *Payroll > Tables > Tax/Deductions*
 - *Payroll > Tables > Bank Codes*
 - *Personnel > Maintenance > Staff Demo (all tabs)*
 - *Personnel > Maintenance > Employment Info*

Next Year Payroll Process



- ***After*** *Step 4* and prior to continuing this process, log on to the **next year** pay frequency.
- *Step 12 – Update tax/deductions*
 - **CAUTION:** Be sure to type the new school year (**2027**) and click **Retrieve** prior to updating any information on these tabs. Make sure that you do not accidentally update the 2026 information.
- *Steps 14, 15, 16, 17 – Mass update steps*
 - **CAUTION:** To avoid entering data in an incorrect pay frequency, ***be mindful of the pay frequency to which you are logged on*** as you may be ***changing back and forth between the current year and next year’s pay frequencies for several months.***

Next Year Payroll Process



- *Step 16 – Mass update various employee fields*
 - **CAUTION:** Do not update any **Experience** fields at this time. Experience should not be updated until after the service records have been extracted and saved. Once the service records are complete, you can update records in either the current year or the next year. ***It is important not to forget this step as it must be completed prior to Fall PEIMS reporting.***
- *Step 19 – Mass update salary calculations*
 - **CAUTION:** The State Min Salary field is calculated by multiplying either the State Min Days or the # of Days Employed by the appropriate daily rate from the state minimum salary table for all pay types that have state min. The % Assigned field in the State Info section on the Job Info tab is also considered in this calculation. ***The State Min Salary field should be checked closely and manually updated, if necessary, after performing salary calculations.***

Next Year Payroll Process

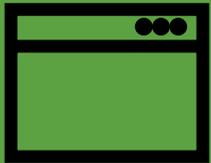


- *Step 29 – Interface to Budget*

- Prior to Interfacing Next Year Payroll to Budget, discuss with your Business Manager if it should be interfaced to Next Year **Recommended** or Next Year **Approved** Budget.
- If distributions or employees are changed after the first calculations are interfaced, you may be required to log back on to the current pay frequency and use the *Payroll > Next Year > Copy CYR Tables to NYR > Clear Next Year Tables* tab with the **Clear NY Payroll Budget Only** option selected to recalculate and interface the new changes back to the next year frequency. **At this point in the process, please do not select any of the tables and do not move any tables from left to right as this will delete any work completed in NYPR.**

Helpful Links

- [March TRS Update](#)
- [Next Year Payroll Process Guide](#) (Revised 3/19/26)
- [Next Year Payroll Process Quick Checklist](#)
- [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](#)



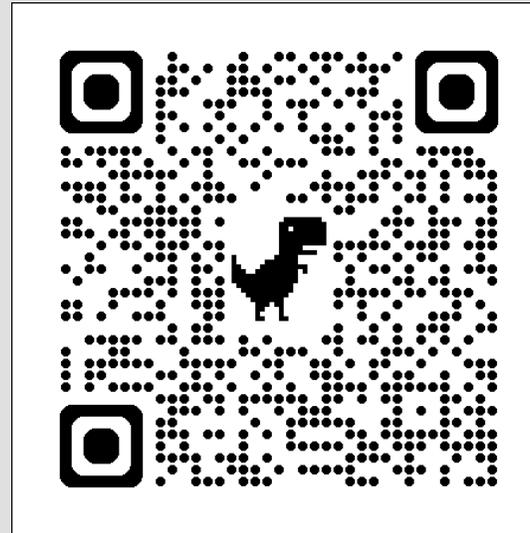
Thank you
for attending!

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.



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