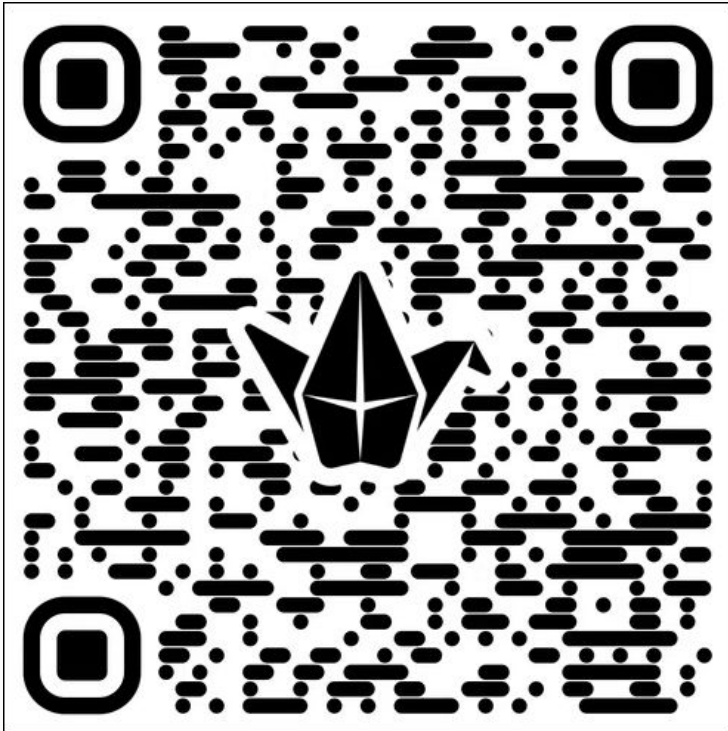


411 Webinar

IMS Business

April 29, 2026

Welcome to the April 411!



Please scan QR code or
click link [here](#) to proceed
to Padlet.

You will be prompted to
answer a few questions
before we begin the
webinar today.

**Thank you for your
participation!**

Zoom Norms

- Please turn on cameras.
- Please take a few minutes to fill out the brief questions on Padlet.



ASCENDER Updates



 **ASCENDER Releases**

*Recent Update **11.0815** installed on **4/23/2026***

Accounts Receivable

Maintenance > Create/Modify Invoice

- Modified the invoice date fields to only allow numeric values (no spaces). This change corrects the issue that prevented approved invoices from being printed if a date field included spaces.
- Removed the horizontal scroll bar displayed at the bottom of the page when an error occurs



Payroll

Payroll Processing > Run Payroll

- Corrected the issue that caused the **HRS2150 - Pre-Post Check Register** report to display an incorrect payroll period when using the Consolidate Rpts (Consolidated Reports) option.

Payroll Processing > Payroll Adjustments > Check Issue

- Corrected an issue that caused a database error to occur when retrieving distribution records for an employee.



Payroll

Maintenance > Staff Job/Pay Data > Distributions

- Bolded the **Account Code**, **Amount**, and **Activity Code** field labels to identify them as fields that will be extracted during TSDS reporting.

Maintenance > Staff Job/Pay Data Payroll

Save

Employee: Retrieve Directory Documents

PAY INFO JOB INFO **DISTRIBUTIONS** DEDUCTIONS LEAVE BALANCE

Delete	Details	Job Code	Extra Duty	Account Type	Account Code	Amount	Percent
<input type="checkbox"/>	<input type="checkbox"/>			G		0.00	0.000%
Total:						0.00	0.000%

Rows: 1 of 1 Refresh Totals Add

Job Code:

Extra Duty Code:

Account Type: G Standard gross pay

Account Code:

Description:

Amount: 0.00 out of 0.00

Percent: 0.000%

Activity Code: Re-sort

TRS Grant Code:

Worker's Comp Code:

Expense 373: N Account not used in ASB distr

Employer Contribution:

Performance Pay:



Payroll

Reports > Quarterly Annual Reports

- Modified the program to correctly calculate the W2 reportable overtime on the **HRS5100 - W-2 Forms** and **HRS5350 - Reportable Overtime** for **Calendar YTD** reports.



Personnel

Maintenance > Staff Demo > Demographic Information

- Repositioned the Name (**Title, First, Middle, Last, Generation**) field labels to display above the entry fields instead of below.
- Bolded the **Staff ID/SSN** and **Texas Unique Staff ID** field labels to identify them as fields that will be extracted during TSDS reporting.
- Corrected the program to set the **Extract for UID Resub** value to **N** for newly created employee records. This change allows new employees who meet the applicable criteria to be included in the *Texas Unique Staff ID Interface > Staff ID Export*.



Personnel

Maintenance > Staff Demo > Demographic Information

Home Maintenance > Staff Demo Personnel

Save

Employee: Retrieve Directory Add Emp

DEMOGRAPHIC INFORMATION CREDENTIALS VERIFICATION INSURANCE SERVICE RECORD RESPONSIBILITY

Staff ID/SSN: Texas Unique Staff ID: Extract for UID Resub Last Change: 00-00-0000

Name

	Title	First	Middle	Last	Generation	Maiden Name
Legal:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Former:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	



Reminders



Important Information to Review

ASCENDER Next Year Payroll: Retiree Pension Surcharge Calculation

- Next Year Payroll is doubling the Retiree Pension Surcharge when calculating for Budget. Please be sure to review reports.

Example: Retired teacher earning \$54,540 annually (\$4,545 monthly), who is subject to the Retiree Pension Surcharge **should** be calculating for the Surcharge as follows:

$$\mathbf{\$4,545 \times 16.5\% = \$749.92 \text{ monthly}}$$

If the retiree works a 10-month calendar, the amount that should be budgeted in object 6146 would be \$7,499.20 (\$7,500 when it rounds for Budget). If they work 12 months, the amount would be \$8,999.04 (\$9,000 when rounded). ASCENDER is calculating \$14,998.40 or \$17,998.08, respectively.

* **Note:** The TRS-Care Surcharge for retirees (when applicable) is calculating correctly. Remember, this is the \$535 amount for all retirees who are enrolled in TRS-Care.



April TRS Update

- Includes pertinent information, timely reminders, and updates



Quarterly Reports

- **For First Quarter (January-March)**
 - 941 and Unemployment reports
 - Due on or before **April 30th**

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

When To File Form 941

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



Facility Usage Data Reporting Requirements

- [TAA Letter](#) dated 4/9/26
- Facility Usage Reporting Link Opens: April 9th
- **Submission Deadline (Survey Form Due to TEA): May 15th**



TSDS Summer PEIMS Submission

- Submission Due: **June 18th**
- Resubmission Due Date: **July 16th**



TSDS ECDS-Pre-K Submission

- Submission Due: **June 25th**
- **Important Reminder:**
 - Review/update **Teaching Specialization** information for **PK teachers** only.
 - *Personnel > Maintenance > Staff Demo > Credentials*

The screenshot shows the ASCENDER software interface. The breadcrumb navigation at the top right is 'Personnel' (callout 1). The left sidebar has 'Maintenance' (callout 2) and 'Staff Demo' (callout 3) highlighted. The main content area has tabs for 'DEMOGRAPHIC INFORMATION', 'CREDENTIALS' (callout 4), 'VERIFICATION', 'INSURANCE', 'SERVICE RECORD', and 'RESPONSIBILITY'. Under 'CREDENTIALS', there are two sections: 'Education' and 'Certification'. The 'Education' section is currently empty. The 'Certification' section contains a table with columns: Delete, Certification Type, Date, Specialty Area, Teaching Specialization (callout 5), Date Expire, and Ex. Yr. The 'Teaching Specialization' dropdown is highlighted with a red box and contains the value 'PK3 - PreK'. The 'Date Expire' field is set to '00-00-0000'.



TSDS ECDS-Pre-K Submission

The screenshot shows a web application interface for managing personnel data. The breadcrumb trail is "Tables > Credential" and the current page is "Personnel". A "Save" button is at the top left. Below the breadcrumb, there are tabs for "MAJOR / MINOR", "COLLEGE CODE", "CERTIFICATION TYPE", "SPECIALTY AREA", "TEACHING SPECIALIZATION", and "SERVICE RECORD NOTES". The "TEACHING SPECIALIZATION" tab is selected and highlighted with a red box. Below the tabs are "Retrieve" and "Print" buttons. The main content area is a table with columns: "Delete", "Teaching Spec Code", "Teaching Description", and "PEIMS PK Teacher Requirement". The table lists various teaching specialization codes (P98, PK1, PK2, PK3, PK4, PK5, PK6, PK7, PK8) and their corresponding descriptions. A dropdown menu is open for the "PEIMS PK Teacher Requirement" column, showing a list of options including "01 Certification offered through an AMI or MACTE accredited center", "03 Employed as PK teacher in district where PK prof development is met", "05 A Child Development Associate (CDA) credential", "06 Documented completion of the TSR Comprehensive", "07 A degree in early childhood education or a related field", and "08 8+ yrs tchg exp natl accredited child care pgm or Texas Rising Star Pgm".

Delete	Teaching Spec Code	Teaching Description	PEIMS PK Teacher Requirement
	P98	P98	98 PK teacher in a school district no additional HQPK Qualification
	PK1	PK1	01 Certification offered through an AMI or MACTE accredited center
	PK2	PK2	
	PK3	PK3	03 Employed as PK teacher in district where PK prof development is met
	PK4	PK4	
	PK5	PK5	05 A Child Development Associate (CDA) credential
	PK6	PK6	06 Documented completion of the TSR Comprehensive
	PK7	PK7	07 A degree in early childhood education or a related field
	PK8	PK8	08 8+ yrs tchg exp natl accredited child care pgm or Texas Rising Star Pgm

- **PK Teacher Requirement Codes**

- *Personnel > Tables > Credential > Teaching Specialization*
- Review and update table as needed



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 tagline "Serve. Lead. Ignite." and the text "REGION 16 Education Service Center". To the right is a "Select Language" dropdown and a search bar. Below the logo are buttons for "Join Our Mailing List" and "ESC Staff Only" with a Facebook icon. A 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". A sidebar on the left lists: "IMS Business", "Announcements", "Training", "Documentation", "411 Webinar", "Helpful Links", and "Support", with a "Subscribe to IMS Announcements" button at the bottom. The main content features 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 "ASCENDER TICKET SYSTEM" with "ASCENDER ESC-16" in the center.



Subscribe to IMS Announcements



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



New 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

Subscribe to IMS
Announcements

IMS Business Training
Schedule 2025-2026

New District Employee
Form



Trainings



Webinars and In-Person

25-26 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
04/09/2026	ASCENDER Business - Tips, Tricks and Reminders for Business Users (Zoom)
02/10/2026	ASCENDER Credit Card Reconciliation (Zoom)
	ASCENDER Bank Reconciliation

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	IW-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)

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



411 Webinars

- **May 20th**
 - Session #: [1031849](#)
- **August 26th**
 - Session #: [1031852](#)
- *411 Sessions begin at 10:00am.*



TSDS Training - NEW DATE

- TSDS/PEIMS Summer Review
 - **May 5th @ 9:00am-4:00pm**
 - Session #: [1038988](#)
 - Lecture Hall - Bell Street Location



IMS Business Trainings (Zoom)

- Creating Service Records
 - **May 21st @ 9:00am-11:00am**
 - Session #: [1031863](#)
- Setting Up & Managing Student Activity Funds
 - **June 10th @ 9:00am-11:00am**
 - Session #: [1032942](#)



IMS Business Trainings (Zoom)

- EOY Processes for June Fiscal Year-Ends
 - **June 16th @ 9:00am-12:00pm**
 - Session #: [1031867](#)



2026 ASCENDER Business Conference

“Taking Care of Business, The ASCENDER Way”

- **June 23rd-25th, 2026**
 - Will be held in **San Antonio, Texas**
 - Conference Registration fee: **\$300**
 - Sessions are presented by ASCENDER consultants from around the state
 - The user conference will be business only this year
 - Region 20 ESC **Session #:** [110391](#)
 - *Must register through Region 20 ESC website*



Spotlight



Additional Reminders for the Budget Process

Budget Account Codes for PEIMS Reporting

- Address account codes that caused fatal errors during Fall PEIMS or Midyear PEIMS.
- Remember, if account codes were updated in Finance but Budget wasn't, these same accounts may end up back in Finance.
 - Important to delete account codes that caused fatals during PEIMS in Budget in File ID N (Step 18). Otherwise, those account codes may get moved back to Finance and show up again as fatals.
 - These account codes can be accessed in prior year file IDs in Budget if needing to reference historical data.



Budget Account Codes for PEIMS Reporting

- Be sure to review the PEIMS-related reminders from the Budget Process guide (listed below):

- Need a line for 5829 - Matching State Funds for 5829 for 410 and for 101, 240 or 701.
- At least one record with an amount >\$0 that is coded to function 13 - instructional staff development.
- At least one record with an amount >\$0 that is coded to function 12, object 6100-6600 - instructional resources and media services.
- At least one record with an amount >\$0 that is coded to function 31-33, object 6100-6600 - guidance, counseling, evaluation services or social work services or health services.
- At least one record with object code 6212 - audit services.
- If function code is 41, then org code should be 701-703, 720, 750 or 751.
- If org code is 701-750, then function code should be 41, 53 or 99.
- **(This does not apply to nonprofit charter schools.)** At least one account code with object code 6491 - Statutorily Required Public Notices.

- Also note that **PICs 32, 34, and 35 should no longer be used.** These need to have been moved to other appropriate PICs.



Step 3 of the Budget Process

- Reminder: This step involves reviewing data in Budget to create the latest historical File ID and comparing it to Finance amounts.
- If any amounts in Budget are not correct, they need to be updated to match what is in Finance. The amounts in Budget must match Finance because the Finance data has been audited and is correct.
- Make changes to budget totals in *In Budget > Maintenance > Budget Data > Approved* tab.



TAA Letter - October 16th

HB 2 Implementation: Repeal of 55% Spending Requirement for Compensatory Education Allotment - Reporting Updates

- Program Intent Codes (PIC) 24, 26, 28, 29, and 30 will remain available for use in the Financial Accountability System Resource Guide (FASRG) during fiscal years 24–25 and 25–26.
- **Beginning in fiscal year 26–27:**
 - **PIC 26, 28, 29, and 30 will be removed from the FASRG.**
 - ***School systems are strongly encouraged to continue using PIC 24 internally for budgeting and tracking*** to maintain clarity and consistency in local documentation and reporting; however, the agency will consolidate the PIC 24 reported expenditures into PIC 11 for state reporting purposes and PEIMS financial reports.



Helpful Links

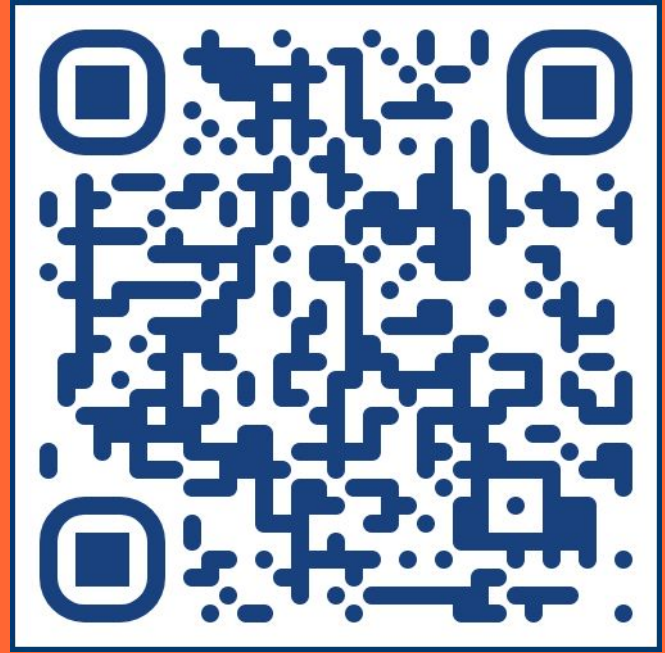
- [April TRS Update Newsletter](#)
- February 411 (**41:00 mark**)
 - [Budget Process Guide](#)
- March 411 (**21:30 mark**)
 - [Next Year Payroll Process Guide](#)
 - [Next Year Payroll Process Quick Checklist](#)
- Submit a [TIMS Ticket](#) for TSDS/PEIMS Assistance
- 25-26 IMS Business Trainings [Link](#)
- 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 (linked [here](#)).



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