



Harris School Solutions has an issue tracking system, named “Aha!”, to monitor program enhancements and defects. The WEBSMART numbers refer to the issues in Aha! that were resolved in this release.

To submit an idea for product enhancements/improvements, click [here](#).

## Release webinar

Issues marked with two asterisks (\*\*) are included in the Release Webinar AND a technical document. Click the **Play recording** link below to open the webinar. Registration with your name & email address is required, but no password is required.

**Play recording** (22 min)

## New Features

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### Admin

- **\*\*Reports > Report Admin > Built In Reports:** New Industry Certifications/Licensure Report was created that can be run in the Grading and PEIMS categories in Excel formats with filters including date range, ISP, PEIMS Collection and effective dates. Also, can be run in Student > Reports > Grading category. WEBSMART-2104

### Compliance > State > Texas

- **\*\*Local > KPI Dashboard:** Created Charter First Indicators in 22-23 school year. WEBSMART-2300

### WebSmart Parent Portal

- **\*\*Settings > My Profile:** Parent Portal users can update their contact information (e.g., name, address, phone number, receive electronic report cards) through the portal. The change request will appear on the WebSmart Dashboard so that admins can approve or reject the change. Approvals and rejections will appear on the Parent Portal user’s My Profile page. WEBSMART-2041



## Improvements

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### Admin

- **Reports > Report Admin > Built In Reports:**
  - Added primary contact's email address to the Parent Portal Access Codes Report. WEBSMART-2333
  - **\*\*To clarify some reports for the OLD parent portal, two reports were renamed - Parent Portal to Legacy Parent Portal and Parent Portal Accounts to Legacy Parent Portal Accounts.** WEBSMART-2291
  - Now displays the name, email and datetime stamp when parent viewed the report card in Parent Portal. WEBSMART-2332
- **\*\*Student I/O > Student Import Definition & Student Import:** Added new fields 'Financial Aid Application Code' and 'Financial Aid Application Requirement Met Date' to the Student Import to create the Financial Aid Application Import & Report. WEBSMART-2107

### All Modules

- **\*\*Reports:** Changed position of the 'Favorites' parameter to appear first in the category selection drop down. WEBSMART-2121

### Finance

- **\*Make Payments:** Now can select specific items, bills, or vendors to pay as a live check. WEBSMART-2116
- **\*\*No Printing Checks for Unsaved Check Runs:** Users can no longer print checks or direct deposits on a check run that has not been saved. This is to prevent printing a check and then deleting the check run, leaving a check without a transaction in WebSmart. WEBSMART-2297
- **Reports:** Employee Leave Detailed report now shows the Leave Policy effective date and leave group information above the Employee Contract information. WEBSMART-2249

### State / Federal Requirements

- **Code Changes & PEIMS/TSDS reporting changes:**
  - Additions/Revisions/Deletions to Code Table C022 Service IDs for 2023.0.0, 2023.1.0, and 2023.2.0 WEBSMART-2064, 2065, 2066, 2381, 2382, 2083,
  - Additions/Revisions/Deletions to Code Table C145 Fund Codes for 2023.0.0, 2023.1.0, and 2023.2.0 WEBSMART-2067, 2068, 2069
  - Deletions to Code Table C147 Program Intent Codes for 2023.0.0 and 2023.1.0 WEBSMART-2070
  - Deletions to Code Table C178 Crisis Codes for 2023.0.0 and 2023.1.0 WEBSMART-2071
  - Creation of Code Table C230 Financial Aid Application Codes for 2023.0.0 and 2023.1.0 WEBSMART-2073
  - Creation of Code Table C231 Dyslexia Screening Exemption Reason Codes for 2023.0.0 and 2023.1.0 WEBSART-2074
  - Creation of Code Table C232 Post-Secondary Certification Licensure Result Codes for 2023.0.0 and 2023.1.0 WEBSMART-2075
  - Deletions to Code Table DC059 Entry Type Data Element for 2023.0.0 and 2023.1.0 WEBSMART-2076
  - Additions to Code Table C181 Staff Type Codes for 2023.2.0 WEBSMART-2386

- **Code Changes & PEIMS/TSDS reporting changes (Continued):**
  - Revisions to Code Table C212 NSLP Type Codes for 2023.0 WEBSMART-2387
  - PEIMS/TSDS 40100 / 49010 StudentExtension Complex Type for 2023.0.0 and 2023.1.0 Changes for the Fall/Summer PEIMS reporting. Revised data elements E0006 Date-of-birth, E1632 Effective-Date, E1530 Dyslexia-Indicator-Code, E1640 Post-Secondary-Certification-Licensure-Code and Additions of data elements E0895 Home-Language-Code, E1732 Dyslexia-Screening-Exception-Reason, E1733 Post-Secondary-Certification-Licensure-Result. WEBSMART-2087
  - PEIMS/TSDS 40110 / 43415 StudentSchoolAssociationExtension Complex Type Changes for 2023.0.0 and 2023.1.0. Revisions to data elements E1044 Last-Date-Of-Enrollments, E1079 Primary-Pk-Funding-Source, E1080 Secondary-Pk-Funding-Source and Deleted E1435 Entry-Type. WEBSMART-2088
  - PEIMS/TSDS 48011 StudentGraduationProgramExtension Complex Type changes for 2023.0.0 and 2023.1.0 Added data element E1724 Financial-Aid-Application-Code. WEBSMART-2101
  - PEIMS/TSDS StudentExtension Complex Revised data elements for 2023.2.0 Revised length from 3 to 4 for both elements E1640 Post-Secondary-Certification-Licensure-Code and E1655 IBC-Vendor-Code. WEBSMART-2375
  - CTE FTE Calculation changes and other various changes made to Principal/Superintendents, Career and Technology Contact Hour Detail and Student Detail reports.
  - Various updates to PEIMS and Child Find have been completed in time for the summer submission.

## Students

- **\*\*Reports > Parent Portal Config:** Created a new report to show parents that are configured on the Parent Portal. This will only show parents that have a link to a student and the student has an instructional period. WEBSMART-2115
- **\*\*Reports:** Summer School - Third Party Extract Changes removed the 'Include Summer School?' checkbox parameter from the following reports because it was not applicable. WEBSMART-1461
  - SNAP Extract
  - TReX XML (new)
  - TPRI Extract
  - Blackboard Connect 5i Extract
  - CRDC Excel Export
  - Destiny Extract

## Bugs Fixed

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### All Modules

- Calendar Picker Title appears while in Chrome browser has been corrected. WEBSMART-2302

### Admin

- **District > Campuses:** Corrected to not allow duplicate Campus Numbers to be entered. WEBSMART-2342, 2326
- **District > Campuses > Annual Information:** Campus ELO Activity Minutes are now being reported for multiple ELO activities on the Annual Inform Editor screen for years 20-21 and prior. For years 21-22 going forward the ELO Activity Minutes column will not display on the Annual Information Editor screen, they will be listed on the ELO Activity screen for each ELO Activity. WEBSMART-2439

### Finance

- **Human Resources > Organization**
  - Mass Update: Updated status of progress bar so it doesn't appear to be hanging. WEBSMART-2145
  - Promote Contracts: When changing contract types on position types the promote contract screen was not grouping accordingly. It is now grouping based on updated contract type. WEBSMART-2325
- **Payroll > Processing > Payroll Checks:** Payroll check stub address not displaying properly in window envelope. This has now been corrected and displaying the city, state, and zip line through the window envelope. WEBSMART-2330
- **Payroll > Supporting Data > Federal Tax Tables:** Federal Taxes not calculating when no limit was setup. Tax Tables needed an upper limit, added 9,999,999.99 as max value. WEBSMART-2153
- **Reports:**
  - **Expenditures by Object Budget Report:** Sometimes not printing in correct order has been fixed to keep the group of funds together. WEBSMART-2152
  - **FSP Six-Week Report:**
    - The CTE FTE Cycle 1-4 totals have been corrected to show the correct amounts. WEBSMART-2345
    - Eligible Bilingual/ESL, Bilingual LEP Dual lang, & Bilingual Non-LEP Totals corrected. WEBSMART-2401
    - Bil/ESL Refined ADA formula to match Principal Super report. WEBSMART=2433
    - Principals Report Detail - now pulling the correct number of days or FTEs for Bil/ESL WEBSMART-2320
  - **Principals Budget Report:** Missing headers was corrected by changing the font size. WEBSMART-2152

## Students

- **Charter First Dashboard:**
  - For Fiscal Year Rating 21-22, indicators 10,16, and 21 have been waived. Automatic scoring has been applied for these indicators. Waived Indicators apply only to a Fiscal Rating Year. For Fiscal rating Year 20-21, Indicator 10 is not waived and is calculated and scored. KPI Report now includes the Waived column indicating which if any indicators have been waived for that Fiscal Year Rating. Formula adjustment for Indicator 15: Indicator 15 will apply a passing score if A-C=0 based on the ruling in the 21-22 worksheet parenthesis for indicator 15. For Fiscal year 21-22 A-C does not =0; however, for Fiscal year rating 22-23, A-C does = 0 and the max points of 10 have been applied. The conditional for A-C=0 will be evaluated with each year's worksheet to determine if the conditional formula still applies for the new fiscal year rating. If not, it will be removed for that fiscal year rating during the KPI Update/Rollover. A new Waive column has been added to the KPI Viewer, WAIVE. If an indicator is identified by the state as being waived for that fiscal year rating period, a YES will appear in the column and the indicator will receive the max points allowable for that indicator. NO calculation will be performed. The waived indicators will be identified each year during the October worksheet review for the next fiscal year rating and pre-set during the KPI Viewer Update/Rollover for that fiscal year rating. Waived Indicators will be waived per Fiscal year rating and apply to that Fiscal Year Rating ONLY. WEBSMART-2295
  - Indicator 12 corrected misspelling of on KPI Viewer the word 'Principle' to 'Principal'. WEBSMART-2357
  - Indicator 12 now has a parameter for Principal expense and is calculating correctly. WEBSMART-2356
  - Indicator 12E Principal Expense changes to report the difference between Opening and Ending balance for the fiscal year and General Ledger report added to the KPI Dashboard. WEBSMART-2432
- **Other > Reports > Parent Portal Access Codes Report:** School code now display on Parent Portal Access Codes report. WEBSMART-2347

## New & Revised Topics in the Online Help

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### *New topics*

Topics added to Help:

Students>Student Manager>Permanent Record>Report Cards

Students>Grades>Report Cards

Technical Documents added:

Report Cards

Parent Portal User Guide

### *Revised topics*

Students>Student Manager>Contact Info – PRC indicator

Various UI screenshot updates throughout Finance HR, Purchasing/AP, Banking/Receipts, Finance Reports, Student Contact Tracing Report, Student Manager, Attendance and Gradebook