

CAPPS
HR/Payroll User Group
Tuesday, September 25, 2018
9:00 a.m. – 11 a.m.
Travis Building, Room 1-100

Meeting Minutes

Conference Room Attendees*

First & Last Name	Email	Agency/Role	Attended
Adrienne Rogers	adrienne.rogers@cpa.texas.gov	Comptroller of Public Accounts (CPA) - CAPPS Production Support	Yes
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**Note: attendee list may not reflect all conference call attendees.*

I. Welcome (Andrea Smith)

- Roll call for phone participants. Quorum confirmed.
- All User Group meeting materials will be posted on FMX in the next few days.
 - To be added to the User Group distribution list, please send an email to the CAPPs Governance and Communications Team at CAPPs.GTT@cpa.texas.gov.

II. Production Update: Financials Support Requests (SRs)

- **SR Summary and Trend Report (Andrea Smith)**
 - User Group members were provided with a summary of all active SRs on the HR/Payroll system.
 - There were 809 active SRs and 199 were considered high.
 - The high number of SRs are due primarily to FYE activities such as commitment accounting updates and HR Year End updates, as well as ongoing cleanup efforts and requests for baseline exceptions.
 - There are currently no critical SRs.
 - For the month of August, there were 714 SRs opened and 761 closed.
- **Governance Approved Enhancements (Andrea Smith)**
 - A spreadsheet of Governance Approved SRs was provided. Updates since the last meeting are identified with an asterisk (*) and **bolded**.
 - Five new SRs have been added to the list. These were approved by the CAPPs Steering Committee through their August 14, 2018 meeting vote. The SRs were initially presented to the User Group for vote at the June 26 meeting.
 - SR 7600 – placed in *Assigned* status. This SR is for the development of a new query to manage the information captured in Performance Notes.
 - SR 7972 – moved to *In Work*. This enhancement will modify the permissions for the TX_EP_AGENCY_ADMIN role to view, modify, and transfer Performance Notes but not include access to Development Documents.
 - SR 7974 – placed in *Assigned* status. This enhancement will modify the permissions of the TX_SS_MANAGER_EPM role to remove the ability to delete documents and add new content to allow managers to request the cancellation of documents based on five pre-defined reasons for cancelling.
 - SR 7561 – moved to *In Development*. The SR will make the Doc ID available as a searchable feature on Performance Management agency administrator pages.
 - SR 7973 – moved to *In Work*. This SR is for the creation of a new security role that will provide agencies with the ability to assign view access to key fields for users designated to respond to Public Information Requests.
 - SR 6904 – spreadsheet shows status as *Pending Prod Migration* but the SR was successfully migrated to Production last Thursday, September 20.
 - SR 6188 – moved to *In Work*.
 - SR 6538 – moved to *In Development*. This SR will add a new Mandatory Comments section into the Performance Management templates. Development of this functionality is moving along well.
 - SR 5005 and SR 1111 have both been moved to *Assigned*.
- **Required Maintenance (Andrea Smith)**
 - User Group members were provided a list of Required Maintenance SRs. Updates since the last meeting are identified with an asterisk (*) and **bolded**.
 - Most of the SRs on this list are related to the Time and Labor modules.

- SR 408 – moved to *Rework*. This fix will correct CAPPS from awarding accruals to employees who are mid-month direct transfers.
- SR 1455 – moved to *In Work*. This SR is to correct the issue of incorrect email notifications being sent out for time changed when time was not changed.
- The following SRs have all been moved to *Pending Prod Approval*.
 - SR 1503 – This SR will correct the issue of managers who report to themselves and can approve their own time.
 - SR 5314 – This SR will correct the issue of Super Users who can enter/approve their own time.
 - SR 7144 – This SR will correct issues around the FMLA Leave Activity report and the inclusion of Holidays towards FMLA balances.

III. Production Update: Fiscal Year End Wrap-up (Andrea Smith)

- FY18 Fiscal Year End activities have been successfully completed.
- At the end of this meeting, the CAPPS Production Support Team will provide an in-depth look at the Time and Labor modules.

IV. Production Update: FMLA (Andrea Smith)

- This discussion is a follow-up to the FMLA Project presentation done at the May 22, 2018 User Group meeting.
- During the May presentation, the CAPPS Support Team presented the strategy for addressing FMLA in CAPPS, including a list of items to be fixed with short-term and long-term target dates for completion.
 - All short-term fixes are now in Production:
 - Implemented changes to Timesheets.
 - Renamed the FMLA field to show that it also captured military and other leave.
 - Removed the link from the Timesheet
 - Corrected FMLA Leave Activity Report issues where holidays were being incorrectly captured.
 - Changed FMLA Leave of Absence so it can only be done on the Timesheet now and is no longer available as a Job Data entry.
- The Support Team has now started work on the long-term fixes and have put together a team to focus on these items.
 - As a first step, the team has reviewed all the FMLA SRs, combining requests when possible and closing others as appropriate.
 - Four key SRs being worked are:
 - SR 8922 – Creation of a 'Checkbook' display that shows an employee's beginning balance, time taken per day, time credited back, and daily available balance.
 - SR 8997 – Creation of an FMLA Balances report that will display the same information contained in the 'Checkbook'.
 - SR 8995 – Creation of a Frequency Exceeded report.
 - SR 7312 – Development of Timesheet edits to prevent employees from going over their allowable FMLA balance.

V. Upcoming Vote: SRs Submitted to Governance (Andrea Smith, Rebecca Kelly)

- There are four SRs being submitted for User Group consideration. The CAPPS Support team is recommending approval of all four items.
 - SR 8506 – Creation of a new query to show dually-employed employees, including active duty members.

- The other three SRs on the list are related to the Recruit module.
 - SR 5193 – Remove unnecessary icons from the list formats and the file indicator configuration. Note: Icons listed in this SR will remain on the candidate/job submission cards.
 - The question was asked if it was possible to tell if any internal candidates had applied for the position. For any new employees who were hired since the internal candidate interface was disabled in August, the answer is no – you cannot tell who is internal and who is not. The internal candidate icon will remain in some places; however, the meaning is diluted due to retiring the internal candidate interface.
 - SR 7176 – Update the Default History Event Categories to include all categories instead of the four it currently displays. This configuration change will mean that it will take longer to pull up the information on this page due to the increased amount of data being pulled.
 - SR 8447 – Update the Requisition Details Report to include Position Number.

VI. Project Update: HR/Payroll FY19 Deployment (Alison Williams)

- The kickoff for the FY19 HR/Payroll Deployment project was held on September 6, 2018.
- The timeline is still being worked out. Once the timeline is confirmed, the CAPPS Support Team will begin presenting the Project Dashboard.

VII. Project Update: Recruit FY18 Deployment (Alison Williams)

- The FY18 Recruit Deployment is completed.
 - Release 1 deployed on May 21, 2018 with four agencies: SOAH, TCOLE, RRC, and TAHC.
 - Release 2 deployed on August 20, 2018 with five agencies: TDI, OIEC, TMD, TEA, and TMB.
 - Post-Production Support is wrapping up.
- The FY19 Recruit Deployment is in early planning stages – the rollout plan and timeline are still being determined.

VIII. Project Update: Learn FY19 Deployment (Alison Williams)

- Currently, there are three agencies that have deployed Learn.
- Several agencies have inquired about the Learn modules but the CAPPS Team does not yet have a timeline for the next deployment group.
- A number of different options and approaches are being evaluated before the next deployment strategy and timeline are created.
- The CAPPS Team will provide additional updates as the planning progresses.

IX. Special Topic: FYE / Time and Labor Modules (Adrienne Rogers)

- Adrienne Rogers from the CAPPS HR/Payroll Production Support Team presented an overview of the Time and Labor modules related to Fiscal Year End Processes.
 - Annual to Sick Leave Conversion Process
 - This process is to take any Annual Leave remaining at the end of the Fiscal Year that is above the threshold for rollover and convert it into Sick Leave.
 - The process is fairly simple but the CAPPS Support Team is working on new documentation for next year that will provide more detail on how to run the report, including revised checklists.
 - The recommended steps for this process are:
 - Run the Report.

- Go to the process monitor to make sure it's all correct.
 - Check for exceptions
- Leave Liability Report
 - This report is currently being worked on due to some new TRCs that need to be added that are needed for some of the newly deployed agencies.
 - The revisions should be completed in the next few days.
 - Once the revisions are completed, the CAPPS Support Team will rerun the reports for the Production agencies.
- Sick Pool Fiscal Year End Process
 - Prior to running the Sick Leave Pool FYE Process, all awards and donations should be reviewed and any updates/changes should be completed.
 - The report can be run multiple times as the data entry is being cleaned up.
 - FY 18 is the roll year but the number at the bottom is the FY 19 balance after everything has been calculated.
- Military Leave Rollover Process
 - Military Leave balances are based on the Federal Fiscal Year, which begins on October 1.
 - Up to 360 hours can be carried over.
 - The hours must be rolled forward per Federal law.
- State of Texas Emergency Leave Reporting App
 - On September 24, the CAPPS Production Support Team extracted the Emergency Leave Data for agencies who have people in excess of 32 hours used during the Fiscal Year. The data was uploaded to the web application tool.
 - Most agencies' data is ready to be certified. Designated agency users will need to pull the data and complete the columns for the fields that require comments.
 - Once the required entries are made, the data needs to be reloaded into the tool to complete the certification.
 - The team is still working on reviewing the data for a few of the larger agencies.
 - The support team will be reaching out to these agencies with an update on the status of their reports.
 - The deadline to certify is October 1, 2018.
 - Designated agency users should call the CAPPS Help Line with any questions or concerns during the process.
 - If the designated users do not already have access to the tool, they will need to contact their agency's Security Coordinator.
 - For FY 19, agencies will have to complete required comments on certain categories but will not be able to make corrections once the data is uploaded into the web tool.

X. Meeting Close

- The next User Group meeting is on Tuesday, October 23, 2018 in the Travis Building, Room 1-111. Please note this is a different room location than the one normally used for the User Group meetings.
- There will be a Multi-System User Group meeting following the October meeting.