

**CAPPS**  
**HR & FIN User Group**  
**Thursday, November 21, 2019**  
**9:00 a.m. – 11 a.m.**  
**Travis Building, Room 1-111**  
**Meeting Minutes**

**I. Welcome (Andrea Smith)**

- This is a Webinar through Webex.
- User Group meeting materials will be posted on FMX.
  - To be added to the User Group distribution list, please send an email to the CAPPS Governance and Communications Team at [CAPPS.CGC@cpa.texas.gov](mailto:CAPPS.CGC@cpa.texas.gov).

**II. Production Update: Financials Support Requests (SRs) (Anthony Martin)**

- **SR Summary and Trend Report**
  - The **CAPPS Financials Summary and Trend Report 11/21/19** document was reviewed.
    - In October, there were 804 active SRs with 289 in high priority status. There were no critical SRs.
    - There were tickets 506 opened and 466 tickets closed for October.
    - As shown on the Trend chart, there were 506 SRs opened and 466 were closed in October. 60 HX are recycle reporting, and 126 were Control-M issues.
- **Governance Approved Enhancements**
  - The **CAPPS Financials Governance Approved SRs 11/21/19** document was reviewed. Updates since the last meeting are identified with an asterisk (\*) and **bolded**.
- **Required Maintenance**
  - The **CAPPS Financials Required Maintenance 11/21/19** document was reviewed. Updates since the last meeting are identified with an asterisk (\*) and **bolded**.

**III. Production Update: HR/Payroll Support Requests (SRs) (Andrea Smith)**

- **SR Summary and Trend Report**
  - The **CAPPS HR/Payroll Summary and Trend Report 11/21/19** document was reviewed.
    - In October, there were 774 active SRs with 136 in high priority status. There were no critical SRs.
    - As shown on the Trend chart, there were 681 tickets opened and 841 tickets were closed for October.
- **Governance Approved Enhancements**
  - The **CAPPS HR/Payroll Governance Approved SRs 11/21/19** document was reviewed. Updates since the last meeting are identified with an asterisk (\*) and **bolded**.
- **Required Maintenance**
  - The **CAPPS HR/Payroll Required Maintenance 11/21/19** document was reviewed. Updates since the last meeting are identified with an asterisk (\*) and **bolded**.

**IV. Upcoming Vote: SRs Submitted to Governance (Rebecca Kelly)**

- The **CAPPS SRs Submitted to Governance 11/21/19** document was reviewed. Updates since the last meeting are identified with an asterisk (\*) and **bolded**.
  - SR 17603 is a Reports and Recruiting module to build a Time to Hire Report in OBI to track the time between dates on a requisition and hiring the selected candidate.

- SR 17983 is a Reports and Recruiting module to change a candidate work flow and add an optional step for pre-interview assessments.
- SR 17992 is a Recruiting module for a candidate job submission to require the type of school, job type, summary of experience on their job submission.
- SR 17994 is a Recruiting module is for tracking fields to be added to Recruit and agencies would use the fields to manually select to track how far along you are in the hiring process.
- SR 17984 is a Recruiting module for the offer letter, this would change the message template wording to state, “an offer” in place of “a final offer”.
- SR 17987 is a Recruiting module to update the template to the candidate from “company” to “organization”.

**V. Project Update: FIN FY20 Deployment (Nyguel Sanders)**

- The **CAPPS FY20 FIN Agency Deployment Project Dashboard 11/21/19** document was reviewed.
- The project is green, and the project is on track. For the September 1, 2020 is the Go-Live date.
- Key items in the next 30 days:
  - Begin Agency Batch Schedule
  - Continue effort for prototyping sessions
  - Complete Phase 2 FDD
  - Continue Executive Sponsor calls
  - Complete Agency Discovery Fit/Gap

**VI. Project Update: HR/Payroll FY20 Deployment (Diana Urban)**

- The **CAPPS FY20 HR/Payroll Agency Deployment Project Dashboard 11/21/19** document was reviewed.
- The project is green, and the project is on track. For the July 13, 2020 is the Go-Live date.
  - Key items in the next 30 days:
    - Complete Final Gap Sign-off Documents
    - Conduct Gap Analyst of Reports and Queries
    - Conduct Mock 1 Conversion

**VII. Project Update: FY20 Recruit (Martin Dassi)**

- The **CAPPS FY20 Recruit Project Dashboard 11/21/19** document was reviewed.
- The project is green and on track. For the May 28, 2020 is the Go-Live date.
- Key Items in the next 30 days:
  - Complete Gap Analysis Phase 2
  - Complete Configuration
  - Begin Preparing for Conference room Pilot (CRP) sessions
  - Complete Conference Room Pilots for CPA Onboarding

**VIII. Project Update: FY20 ELM (Martin Dassi)**

- The **CAPPS FY20 Recruit Project Dashboard 11/21/19** document was reviewed.
- The project is green and on track. For the April 6, 2020 is the Go-Live date. Texas Parks and Wildlife and Rail Road Commission are the agencies that will Go-Live.
- Key Items in the next 30 days:
  - Complete Discovery sessions
  - Complete Gap Analysis Phase 2

- Complete Configuration
- Begin Build
- Begin Conversion

**IX. Discussion Topic: TWC Quarterly Reports (Hima Bode)**

- **The TWC Quarterly Wage Reporting Changes document was reviewed.**
- CAPPS is Eliminate Hard Coding from the process, agencies need to make update to state tax data. This applies only when hiring an employee in these job codes; BD25, CP25, JD25. This goes into effect 1/1/2020.

**X. Discussion Topic: Consolidated Payroll Entry (CPE) Override Function (Cheryl Groeninger)**

- **The CPE Override Functionality document was reviewed.**
- The CPE override function will allow for deductions and Tax overrides.

**XI. Discussion Topic: Calendar Year End (CYE) (Cheryl Groeninger)**

- **The Calendar Year End Activities Presentation 11/21/19 document was reviewed.**
- Agencies need to note to not onboard their December hires into CAPPS until you get clearance from CAPPS.
- CAPPS is not receiving the software from the vendor until December 6 so there is an anticipation for December 16 as the date the new tax form will be available share to agencies. An agency wide email is being sent for the update.
- There is not cutoff time for the old form from the IRS. There is paper form from the IRS you can hand out to new hires and then wait to file in CAPPS until the 16th.
- Other income for withholding in our CAPPS system will work as IRS has stipulated. An employee can make calculations, but the employee is then responsible.
- Employees need to update their mailing address and consent for the W-2 and 1095-C. If you mail a form to an employee and they lose the form, they still have access online in employee self-service.

**XII. Discussion Topic: Identity Access Management Update (IAM) (Chelsa Vinklarek)**

- This Project for CAPPS to purchase software to provide another level of security through avenues such as Multi-Factor-Authentication, and Single Sign-on. CAPPS is continuing to move forward with this Project but is taking a temporary pause. This will not go live in March as previously stated. This will be a delayed date with more information to come.

**XIII. Discussion Topic: New PeopleSoft Dashboard/Portal Replacement (Chelsa Vinklarek)**

- A live Demo of new portal with the dashboard was shown. At the January User Group CAPPS will have more to share.
- The change for employee's portal will be taking place April 6. The breadcrumb type of menu is going away, with an alternative in the Navigator.

**XIV. Discussion Topic: Change to Reports Distribution for Financials (Chelsa Vinklarek)**

- More info to come in January User Group. The BLR (Business Logic Role) allows for access to certain reports. In the Financials module it has not worked that way previously, especially upon termination or the move of business functions. Now agencies will assign roles and the user roles are stripped automatically when you terminate an employee. CAPPS does not yet have the role names or roll-out date.

**XV. Discussion Topics**

- No User Group meeting in December.
- January 23, 2020 Travis 1-111 for another joint session with Fin and HR.