CAPPS HR/Payroll User Group Meeting Minutes  
Tuesday, Aug. 23, 2022  
9–11 a.m.  
(Webinar Only)

I. Welcome/Announcements (Saundra Farley)
   - User Group meeting materials for today are posted on FMX.
   - To be added to the user group distribution list, email the CAPPS Governance and Communications team at: CAPPS.CGC.BA@cpa.texas.gov

II. Production Update: HR/Payroll Support Requests (SRs) (Saundra Farley)
   - SR Summary Data
     - There were 966 tickets opened and 816 closed with 797 remaining active for July, six percent of those tickets have a priority of high. Increase in tickets for the month of July is due to the Image and Tools upgrade related tickets and agency FYE tickets were opened.
   - Governance Approved Enhancements
     - Reviewed the CAPPS HR/Payroll Governance Approved SRs 08/23/2022 document. Updates since the last meeting are identified with an asterisk (*) and are bolded.
     - SRs 27091, 4451, and 7045 are current in System Test status and agency UAT is scheduled for Aug. 29 through Sept. 9 with a migration date scheduled for Sept. 15.
   - Required Maintenance
     - Reviewed the CAPPS HR/Payroll Required Maintenance 08/23/22 document. Updates since the last meeting are identified with an asterisk (*) and are bolded.
     - Highlights from the document include:
       - SRs 26769, 32755 and 35680 are in System Test with UAT dates from Aug. 29 to Sept. 9 and migration to production is scheduled for Sept. 15.
       - SR 29767 migrated to production on Aug. 24.
       - SR 38994 migrated to production on Aug. 11 and is now Complete.
   - HR/Payroll Production Release Schedule
     - Introduced the HR/Payroll Production Release Schedule as a new format to display SRs for break-fix, maintenance and enhancement changes. Highlights from the discussion include:
       - There are 15 SRs in the September release — 9 Break Fix, 2 Enhancements and 5 Required Maintenance SRs. These are expected to be in UAT from Aug. 22 to Sept. 9, with a target date of Sept. 15 for production migration.
       - September’s release schedule highlighted SRs 30060, 35831, 36394, 4451 and 25191. All are currently in User Acceptance Testing and discussions regarding each one will be provided during this meeting.

III. Upcoming Vote: SRs Submitted to Governance (Richard Kral, Arun Kumar)
   - Reviewed the CAPPS HR/Payroll SRs Submitted to Governance 08/23/22 document.
     - SR 22438 is for the ePM module to add the due date notifications feature to templates. This SR was removed from the August vote based on feedback provided in the meeting. The CAPPS team will withhold the SR from the voting process while additional feedback is gathered from the agencies. Agency Level 1 support staff are encouraged to enter any feedback/comments about this enhancement to the Project Documentation (Public) section of the ticket.
     - SR 23301 is for the Time and Labor module to add a name search option to the Override Scheduled Workday page.
     - SR 7666 is a modification for the Time and Labor module to change the TL Needs Approval Notifications calculations to be based on the Reported Date instead of the Date/Time Created for cascade rule time entries.
   - The CAPPS Support team recommends approval for these SRs.
IV. Project Update: CAPPS HR/Payroll Fiscal 2022 Agency Deployment Project Dashboard (Gunjan Sahni)

- Reviewed the CAPPS HR/Payroll Fiscal 2022 Agency Deployment Project Dashboard 08/23/22 document.
- Key items:
  - This project is now at 97% completion.
  - Implementation complete.
  - Post implementation support in progress.

V. Discussion Topic: Fiscal Year End (FYE) Reminders (Danette McWilliams, Stacey Hassin, Marissa Hoffman, and Megan Lambert)

- Budget Load Spreadsheet (BLS) Reminders:
  - For clarification, agencies do not load budget documents to the agency HR/Payroll FYE ticket, only load the commitment accounting documents (i.e., department budget table and valid combo code setup).
  - The deadline for agencies to submit the preliminary BLS was Aug. 22.
  - BLS test result validation and final BLS are due to the CAPPS team by Aug. 31.

- Mass Reorg spreadsheet:
  - Final Mass Reorg spreadsheets were due Aug. 22 and Validations must be completed by Aug. 31.
  - Aug. 31 is the deadline for the Temporary Assignment spreadsheets and for agencies to inform the CAPPS team whether to return employees to temporary assignment or disciplinary action.
  - Any payroll entries or terminations effective Sept. 1 or earlier must be processed before the system goes down on Aug. 31 at 5 p.m.
  - Sept. 3 is when the system will come back up and at that time any transaction effective Sept. 1 maybe entered.

- Texas Level Job Code Updates:
  - Updates will be made to Texas level job code titles to match the State Classification Plan.
  - A list of job codes has been provided in Agency FYE SR ticket of job code titles that no longer matches with the new Texas job code titles.
  - It is not required for agencies to make changes but those who choose to make them must insert a new row dated Sept. 1, 2022, in the job code table by Aug. 31 at 5 p.m.
  - Do not process 9/1/22 salary transactions until after the FYE conversion.

- Post-FYE Reminders:
  - For benefits elections, the open enrollment file will run on Sept. 2 and agencies need to review the CAPPS ERS Inbound Results for discrepancies.
  - Agencies have until the end of September to process employee salary actions effective Sept. 1 to ensure the ABBR and Insurance Salary is calculated correctly.
    - Do not process the ABBR until after the FYE conversion.
    - The Insurance Salary file will be created multiple times throughout the month of September, causing ERS to create an error file which will be loaded to agency FYE ticket. Agencies should frequently check the ticket for those files and address any discrepancies found.
    - A final file is generated at the end of September.
  - Under Time and Labor (TL) activities, the Leave Liability report will be provided to agencies no later than Sept. 9 via the FYE SR.
  - Agencies should run the Emergency Leave report Before Sept. 23 for review and verify the data that will be uploaded to the Emergency Leave Reporting web application. Certification is due by Oct. 1.
    - Before Sept. 30, the Annual to Sick Leave Conversion, Leave Liability Report and the Sick/Family Leave Pool must be processed. Please confirm in the FYE SR.
    - Agencies should run the Military Leave Balance Carry Forward process after Sept. 30 and confirm completion in the FYE SR.
VI. Discussion Topic: Annual Emergency Leave Reporting (Megan Lambert)

- Reporting employee emergency leave that exceeds 32 hours to the Comptroller’s office annually is required for all state agencies and institutions of higher education.
- Emergency leave is deemed to be any leave granted to employees according to Texas Government Code, Section 661.902. Additional information can be found on FMX.
- A list of Emergency Leave Time Reporting Codes (TRCs) is provided in the discussion presentation.
- When using TRC EMGNY (Emergency Other), users must include an explanation in the Comments field of the timesheet.
  - The CAPPS Production Support staff will load agency emergency leave information into the Emergency Leave Reporting web application on Sept. 23.
    - It is highly recommended for agencies to validate the emergency leave data before it is uploaded on Sept. 23, by running the TX_TL_SB73_EMERGENCY_LEAVE_RPT query.
    - Emergency leave certification via web application id due on Oct. 1.
  - Agencies that recently deployed in July 2022 will have the emergency leave data that was recorded in USPS or provided to the CAPPS team during deployment converted in CAPPS and available via the CAPPS query.
- Agencies are advised to ensure all appropriate users have access to the Emergency Leave Reporting web application and to submit the request by Sept. 15.
  - Access needed for any users must be submitted by the Agency Security Coordinators.
  - Run the TX_TL_SB73_EMERGENCY_LEAVE_RPT query, or the TRCs by Date report to identify emergency leave used across the agency, then audit the results for accuracy and make timesheet updates as needed before Sept. 23.
    - If users receive a blank report or a message stating “no matching values were found,” it is likely the agency did not grant any emergency leave. Certification is still required.
    - If corrections need to be made to the timesheet or report after it is loaded to the web applications, open an ASP Service Request (SR) for the data to be reloaded to the web application.
    - If corrections need to be made after the report has been certified, submit an ASP SR to backtrack the certification and reload the report. If a certified report is backtracked, it must be recertified.
- Agencies must use the Emergency Leave Reporting web application to certify the agency’s report to meet statutory requirements for the Comptroller’s office.
  - Do not certify until after Sept. 23.
  - Agencies that did not have an employees granted emergency leave are still required to certify.

VII. Discussion Topic: Timesheet Entries in Need Approval (NA) Status (SR 39998) (Megan Lambert)

- TL Superusers were experiencing issues with timesheet entries going into Needs Approval (NA) status.
- A fix for these issues was migrated to production on Aug. 12. If superusers experience any further issues, the agency Level 1 support staff should enter a SR ticket to request assistance from the CAPPS Support Team.

VIII. Discussion Topic: Pay Impacting Forms Report (SR 40279) (Kevin Brown)

- The Pay Impacting Forms (PIFS) report is used to review deductions not taken for new hires.
- CAPPS Support team is recommending this report be retired and replaced with the Monthly ERS Reconciliation report.
- This SR will go for vote at September’s HR/Payroll User Group meeting.
- A ticket has been created for this effort and agencies are encouraged to add questions and feedback to SR 40279.
IX. Discussion Topic: CAPPS HR/Payroll UAT Updates (CAPPS Support Team)

- UAT for the following SRs is scheduled for Aug. 29 through Sept. 9 and Migration to Production is Sept. 15.

- Manager Self Service (MSS) Entry Date (SR 25191) (Shelly Wilder)
  - The MSS error message occurrence is now be based on the transaction date rather than the current date.
  - Agency testing must be done using MSS Full and should use an employee with no entries within six months.

- Hazardous Duty of New Hires (SR 30060) (Kevin Brown)
  - The Hazardous Duty indicator was not updating when new employees are added in CAPPS.
  - Agencies are encouraged to test this fix during UAT to ensure that the Hazardous Duty information is being carried forward through the Job Template Interface.

- Pay Error Message (SR 363394) (Kevin Brown)
  - The error message for adding PAY 025 and PAY 034 as same day actions is not being triggered properly.
  - Agencies are encouraged to test this fix during UAT to ensure that the correct error message is triggered when validating.

- Language Proficiency Display Zero Value (SR 4451) (Kevin Brown)
  - A zero is not being displayed in the CAPPS Employee Profile for the Language Proficiency score.
  - Agencies are encouraged to test this fix during UAT to ensure that when a zero is entered and saved it is displayed on the Employee Profile page.

- TX Paysheet Manager Error (SR 35831) (Hariharan Gopal)
  - When agencies ran an On-Cycle Payroll and successfully paid all employees, then ran an Off-Cycle Payroll for the same payroll period for select employee(s), the TX Paysheet Manager report generated an erroneous “An employee yet to be paid” message for concurrent employees.
  - To test, run the on-cycle payroll and pay all employees and then run an off-cycle payroll. Run the TX Paysheet Manager report and verify there is no erroneous message displayed for concurrent employee who has already been paid.

- Updates for Employee Evaluation Queries (SR 25076, 23995) (Richard Kral)
  - For SR 23995, the Original Hire Date field was added to the evaluations.
    - To Test: Run query TX_EP_AGY_EMPL_EVAL_DOC_STATUS then validate the output.
  - SR 25076 corrects the Date and Time stamp for when employees and managers signed an evaluation.
    - To Test: Run query TX_EP_AGY_EMPL_EVAL_DUE_DATES then validate the output.

X. Upcoming Meeting

- Tuesday, Sept. 27, 2022 — CAPPS HR/Payroll User Group meeting.