

CAPPS HR/Payroll User Group Meeting

Tuesday, March 28, 2023

9–10:30 a.m.

(Webinar Only)

I. Welcome/Announcements

- The HR/Payroll User Group meeting for March was moderated by Sandra Farley, HR/Payroll system support supervisor.
- This month's icebreaker question was: *"Payroll Officers, what is the biggest challenge for your agency in the payroll process?"* Attendees were asked to rank a variety of payroll-related tasks and events from the most challenging to least challenging for their agency. The results will be reviewed during April's user group meeting.
- A summary of the user feedback gathered during the February's User Group meeting was presented by Andrea Smith, CAPPS HR/Payroll product lead.
 - On average, respondents spend approximately 65% of their workday in the CAPPS system.
 - Based on provided answers, the modules most used by attendees included payroll, time and labor, purchasing, benefits, Recruit, reporting and budgets.
- Chelsa Vinklerek, CAPPS product manager, announced changes to the reporting strategy based on feedback gathered during the Reporting Focus Group activities in the summer and fall of 2022.
 - To provide more direct support to agencies who need assistance with reporting/query tools, four additional contractors will be added as dedicated support to the CAPPS Help Desk.
 - The focus of this support will initially be on ad-hoc reporting assistance for small and medium agencies. Although, we anticipate larger agencies, with more robust internal reporting staffing, may also require assistance in some instances.
 - The process to request assistance is not changing. Level 1 support staff at agencies will submit Service Request tickets or contact the Help Desk as usual.

II. Production Updates

- CAPPS HR/Payroll activities were reviewed by Erika Condado-Alvarado, HR/Payroll agency services supervisor, and Sandra Farley.
 - HR/Payroll SR summary data for February 2023 was reviewed.
 - During February, 606 new tickets were opened and 728 tickets were closed. 726 tickets were carried forward from February into March.
 - The high number of tickets closed was due to calendar year-end (CYE) SRs being completed and closed by the end of the month.
 - The carry-over tickets consisted mostly of SRs in the Human Resources module; the second largest group of tickets were from the Time and Labor module.
 - The HR/Payroll release notes for March 2023 were reviewed. There were two features, 22 bug fixes and 11 improvements for the March release. Highlights included:
 - SR 32458 – Fund information added to the Leave Liability report so that agencywide fiscal year-end totals are broken down by PCA and fund.
 - SR 40648 – Currently, the timesheet shows the latest time entries and ESS users cannot delete a row that is "NA" and save without error.
 - SR 5316 – Agencies now have the option to automatically enroll contingent workers as Time and Labor reporters — so that T&L Superusers can care for this task as necessary without a dependency on support staff.
 - The April 2023 release schedule SRs moved to User Acceptance Testing (UAT) on March 27 and are scheduled to migrate on April 6.
 - The April release has only one monthly release, with a limited number of SRs moving into Production early in the month. This is due to a system code freeze, that begins in early April, as part of the preparation for the HR/Payroll agency deployment in May.

- The SRs highlighted for this UAT activity and the expected outcomes for the testing are:
 - SR 40370 – The “reports to” for the employee *Position* and *Job* rows will be roll-up to the next supervisor level when a supervisor position is vacated. Likewise, the “reports to” for *Position* and *Job* rows will roll back down to the original supervisor position once the position is filled again.
 - SR 35505 – Manager Time Certification pages for direct/indirect reports will display accurate certification information for the selected time period.
 - SR 45134 – A timesheet error message displays when hours are increased for the processed time in submitted status; no error message displays when reducing the hours of processed time in submitted status.
- HR/Payroll SRs Submitted to Governance (voting items) this month included four enhancements for the Human Resources module. These were reviewed by Shelly Wilder and Danielle Groening, HR/Payroll analysts.
 - SR 24807 – Adds two new informational fields, *FMLA Begin Date* and *FMLA Expiration Date*, to the Summary tab of the TX FMLA Balance Inquiry component; and modifies the page to always display FMLA event/balance information even after the event has been closed or completed.
 - SR 33907 – Adds five new values and made available for selection for the Employee Class field. The new values: Manager, Office Special Assistant, Division Special Assistant, Deputy Director and Assistant Deputy Director.
 - SR 44048 – Adds the change percent to the salary history grid located on the Compensation History page.
 - SR 7253 – Adds the requested functional action reason codes:
 - S67 – Action: TER; Short Description (10): NoWork12Mo
 - V46 – Action Reason Type: Voluntary; Action: DTA; Short Description (10): LatEEInit
 - W46 – Action Reason Type: Voluntary; Action: DTA – Data Change; Short Description (10): LatComSel

III. Project Updates

- The CAPPS HR/Payroll agency deployment update was presented by Sandra Farley, HR/Payroll system support supervisor.
 - Six agencies deploying HR/Payroll in Fiscal 2023 are on track to go live on May 8, 2023.
 - Project is 84% complete overall with all milestones progressing as planned.
 - Mock Cutover Conversion, configuration sign-off and Train-the-Trainer are now complete.
 - Remaining pre-deployment activities are all in varying stages of progress, including acceptance testing and cutover planning activities.
- The CAPPS Recruit agency deployment update was presented by Adrian Cantu, CAPPS project manager.
 - The five agencies deploying Recruit in Fiscal 2023 are on track to implement the CAPPS Recruit module on May 17, 2023.
 - Project overall is 67% complete with no risks or issues.
 - Design and Build phases for agency reports are progressing as planned.
 - UAT Kickoff was held on March 20.
 - UAT weekly sessions are scheduled from March 20 through April 21.
 - UAT Agency Test Cases and Scripts are in progress.

IV. Reminders

- Sandra Farley provided an update on the TDIS upgrades that were postponed from March 4. The new implementation date for the upgrade is April 1.
- An email was sent to agency Level 1 support staff and delegated administrators on March 27 announcing the new date. The email details the expected changes to the TDIS system, which include:
 - Delegated Admin (DA) Console has a new URL address. Old bookmarks will not work. DAs are advised to access the console by using the tile inside the CAPPS system.
 - DAs have the ability to update accounts for other DAs at their same access level.
 - TDIS portal now has Preference Management options for the Multi-Factor Authentication (MFA) step — this allows users to identify a preferred (or default) MFA method, rather than selecting the method during each login.
 - TDIS will start processing last name changes — these will be visible to users in the portal.

V. On the Horizon

- Chelsa Vinklerek provided an update on the legislative activity regarding the potential implementation of a 5% increase and how that would be implemented, if approved.
 - The process for implementing the increase would work via the same process used during fiscal year-end rollover, with the increase being set as *Sequence 0* in the process order before any other actions are processed in the system for that effective date.
 - The implementation would also require a similar maintenance window, when CAPPs would be locked out to users for a period of time, while the process was completed.
- Governance Process/Biennium Elections was presented by Tammy Ross, CAPPs ancillary support supervisor.
 - Process for selecting new committee members for the fiscal 2024-25 biennium begins in April and continues into late summer.
 - Candidate nominations and election vote by members are done by the Human Resources (HR) directors and chief financial officers (or the equivalent positions) at each agency for their agency size group.
 - The CAPPs Governance team begins the process in April by verifying contact information. The call for nominations will likely be sent out in May.
 - More updates will be given in future user group meetings, as the election process continues.

VI. Features and User Spotlights

- Contingent Worker TL Enrollment (SR 5316) was presented by Megan Lambert, HR/Payroll analyst.
 - Now agencies are able to enroll Contingent Workers — ASP Service Request (SR) tickets are no longer required.
 - Under the Workforce Administration section, the CAPPs Non-Employee Add page has a checkbox for an “Enroll in Time and Labor” option.
 - If this step gets missed during the employee add process, agencies will not be able to go back and enroll the contingent worker at a later time. In this case, agencies need to submit an SR that includes a Letter of Authorization (LOA) to have the CAPPs system support team add the enrollment.
- Access for ACE Questions (SR 43759) was presented by Rebecca Kelly, CAPPs Recruit analyst.
 - In the current process, users with Recruiter or Recruiter Administrator roles manage the pre-screening (ACE) questions on the job requisition.
 - SR 43759 requests to allow users with the Manager Self-Service (MSS) Recruit or Recruiting Coordinator roles to gain access to manage the ACE questions. The SR is being considered as an enhancement vote for next month, but the support team is requesting feedback from this meeting’s attendees on which access options might be preferred.
 - Options for how this might be implemented (if it is moved forward for a vote) are:
 - Option 1 – No change to the existing roles or setup.
 - Recruiter and Recruiter Administrator roles can update. An inquiry role exists for View access.
 - Recruiters maintain full control of the ACE questions.
 - Option 2 – Minor configuration changes: add View Access to all.
 - Add View access to the Questions section for all CAPPs Recruit users.
 - Users would include approvers, managers, recruiting coordinators, etc.
 - Option 3 – Minor configuration changes: Add Update Access to MSS Recruit and Recruiting Coordinator.
 - Grant access to the MSS Recruit and Recruiting Coordinator roles, allowing them to manage the ACE questions as well.
 - Provide remaining Recruit users with a View-only access level, including approvers and interviewer roles.
 - One question to consider: if Option 3 moves forward for implementation, how closely will agency recruiters monitor the pre-screening questions before they post the job?
 - Option 4 – Complex customization in CAPPs HR/Payroll and CAPPs Recruit User Interface and any additional related configurations necessary to implement.

- The enhancement could create a new role for managing ACE questions, which requires modification to the CAPPS Recruit user interface and changes in the CAPPS HR/Payroll module.
- Alternately, agencies would have to make configuration decisions in order to grant MSS Recruit and Recruiting Coordinator roles access to manage the ACE questions.

VII. Open Forum Q&A

- The open forum question for this meeting was related to the ACE Questions options presented above.
- Attendees were asked to vote for which option they preferred by putting their answers in the chat window. Responses will be reviewed and assist in determining the next steps for SR 43759.

VIII. Deep Dive Topics

- Letters of Authorization (LOA) Process was presented by Marissa Hoffman, HR/Payroll system support analyst.
 - An LOA is a written request from an authorized agency representative requesting that CAPPS production support make data corrections or entries in the CAPPS system in order to:
 - Complete entries that cannot be completed by the agency itself.
 - Correct existing entries.
 - Enter transactions beyond an agency's entry and correction window, which is the current month plus the prior month.
 - LOA signature lists on file expire annually on May 31. Agencies must submit names of authorized employees and a new LOA signature list form no later than May 31.
 - The most current version of the LOA form (form 73-313) can be found on FMX under the **Forms** menu.
 - For the LOA process, there are three common types of data changes:
 - HR data changes
 - Time and Labor (TL) data changes
 - Payroll data changes
 - When preparing LOAs, agencies should fill out the LOA form completely and verify that all the data is accurate before submitting it. Some general guidelines for completing the form include:
 - Do not mask the Social Security number (SSN) or provide only the last four digits. The SSN is required to ensure the change is processed on the correct person's record.
 - Provide the position number (desired or current, if applicable). Ensure the employee's position data is corrected or updated in Manage Position on or before submitting the LOA.
 - Provide the specific transaction(s) needed, including the action/reason code and the order in which transactions should be processed (if multiple transactions are needed).
 - Attach all supporting documentation related to your LOA to the SR ticket along with your completed LOA form. Many transactions, particularly those impacting pay, require a Payroll Policy review to ensure the transaction is permissible before the LOA can be approved and processed.
 - When checking the *Priority Level* of the request, ensure that the three associated questions are answered regarding the effect on payroll processing and if the employee has been overpaid.
- The Fiscal 2023 HR/Payroll Deployment Customizations were presented by Kelly Martin and Helen Sparks, CAPPS HR/Payroll system support analysts.
 - New code developed as part of the Fiscal 2023 deployment cycle will be implemented into the CAPPS Production system on Thursday, May 4. The code is currently in UAT.
 - SR 33207 – Added Family Leave Pool to the Sick Leave Pool tile. The tile was renamed to Time and Leave Pools.
 - Items were added to the left-hand navigation with the tile.
 - Under the Processes tile in the TL Dashboard, the *FYE Sick Leave Pool Balance* menu option has been changed to *FYE Time and Leave Balance*.
 - SR 38883 – Updated code to resolve invalid error message generated on Extended Attributes for Unclassified/Line-item Exempt job codes. The dropdown list was changed to an edit box. No impact to users or security.

- SR 40902 – Updated Payroll navigation for Payroll Summary report and Payroll Register report and added both reports to the *Funding Reports* menu in the left-hand menu.
- SR 40903 – Updated Time Management and WorkCenter tile menus for Superusers and Time Administrators by adding these options to the dashboards. Additionally, the FMLA Balance Inquiry page has been added to the left menu for Superusers.
- SR 40905 – Updated the Position navigation collections.
 - Added Position Budget Status to the page collection in the left-hand navigation.
 - Added Position Funding Report to the HR Reports tile.
 - The pages and report will remain in their current locations. The following roles which grant access to Position Budget Status and Position Funding Report pages are impacted:
 - TX_HCM_HR_ESTABLISH_POSITIONS
 - TX_HCM_HR_MAINTAIN_POSITIONS
 - TX_HR_UPD_ESTABLISH_POSITIONS
- SR 43356 – Updated the *FMLA Event Status Report Type* to include new values/options, including Close/Expired events and Closed/Unexpired events.
- SR 43804 – Increased the *Agency Array* size in the Time Certification Process (SQR HTL00030) to 1000.

IX. Wrap-up/Close Meeting

- The next HR/Payroll User Group meeting is on Tuesday, April 25, 2023.
- The next Financials User Group meeting is on Thursday, April 27, 2023.
- Submit ideas or suggestions for future user group discussion to: CAPPS.Product.Team@cpa.texas.gov