

# CAPPS HR/Payroll User Group Meeting

Tuesday, June 27, 2023

9–10:30 a.m.

(Webinar Only)

## I. Welcome

- The team tested a new polling tool called Slido to use for audience feedback questions and surveys.
  - The Slido section can be added to user screens by selecting it from the Apps options at the bottom of the Webex window, under the Chat section.
  - In addition to the polling feature, Slide has a moderated Q&A section that may be utilized in future user groups.
- To give the audience a chance to test Slido polling features, the audience was asked: *Where are you going for vacation this summer?*

## II. Announcements and Reminders

- Audience questions and answers from the May user group were reviewed.
  - The first question asked in May was: *What's your biggest hurdle with fiscal year-end processing and/or new year setup in CAPPS?*
    - Updating Job Data, including temp assignments and JOB following Commitment Accounting changes. Respondents asked for a job aid for warnings versus fatal errors.
    - Updating Commitment Accounting and Budget Load Spreadsheets (BLS), particularly with department budget tables, and how to ensure they are correct for the changes that have occurred.
    - Updating funding sources in Position Data, particularly with the new position incumbent query.
  - The second May question was: *What are the Top 5 questions you typically receive from users?*
    - Answers to this question were grouped by topic, including specific modules and a general inquiries group.
    - The Time and Labor (TL) and Payroll modules had the biggest lists of questions. A large number of questions also fell under the Human Resources module.
    - These answers will help guide future FAQ and desk aid document development.
- Attendees were reminded of upcoming system maintenance and holiday closures.
  - The CAPPS system is unavailable from Friday, June 30 at 5 p.m. through 7 a.m. on Monday, July 3 during maintenance activities to implement the legislative salary increase effective for July 1.
  - CPA offices, including the CAPPS Help Line, are closed on Monday, July 3, and Tuesday, July 4 in observance of the Independence Day holiday.

## III. Production Updates

- The SR Summary report showed 690 new tickets opened and 675 tickets closed during May 2023. 709 active tickets were carried forward into June.
- The HR/Payroll release for June included two new features, 12 bug fixes and seven improvements. Highlights included:
  - A new comprehensive report of all employees in an agency (including their name, location, current schedule and FLSA workweek) will make it easier for administrators to see all this information in one place. **(SR 43668)**
  - The Benefit Participation Program is determined based on the work hours of all employment instances so in cases where the employee is dually or concurrently employed, the Benefit Participation Program is correct. **(SR 38727)**
  - A new edit to prevent the ability to unconfirm/unsheet a payroll already in a USAS Accepted status, so pay data synchronization issues across CAPPS and SPRS do not occur. **(SR 45575)**

- The HR/Payroll releases for July will migrate to Production on July 13 and July 27, with a total of 27 items being implemented. Highlights of the July release include:
  - A fix for various timesheet edits that are being missed for employees. (SR 43723)
  - An improvement that prevents a new salary/rate from being entered below the minimum or above the maximum for the position. (SR 45419)
  - A fix for Multiple SYS docs (SR 45577)
  - A new feature that gives Last-Used information in the Functional Job Code query. (SR 40571)
- New functionality was highlighted for users to test in User Acceptance Testing (UAT) in July. The test scenario and acceptance criteria are:
  - CAPPS Recruit OBI users filter the Requisition Details report by Current Requisition Status so they can see requisition details for only the selected statuses. Users are now able to filter the Requisition Details report by current requisition status. The default status is set to Sourcing, which means the requisition has been posted. (SR 40725)
  - Time and Labor (TL) users test the timesheet by entering regular hours worked on an agency holiday or similar holiday date. Users should receive a pop-up warning message and correct the Time Reporting Code (TRC) on the timesheet. This helps ensure employees report hours under the appropriate TRCs. (SR 43361)
  - HR Core users run the Employee Compensations Changes report to see an employee's complete classification status. The full job code title is displayed on the Employee Compensation report. (SR 46334)
- Three enhancements are submitted for a vote to add them to the CAPPS HR/Payroll baseline. All three enhancements are for the Performance Management (ePM) module. The SRs and their short descriptions in the ASP tool, along with the user story and proposed solution, are listed below.
  - **SR 19393** – New query to identify second-level approvers.
    - User Story: *As an Agency Admin, I want the ability to identify the second-level approver on a performance document, so that I can follow up with the manager to complete the pending approval tasks.*
    - Proposed Solution Summary: Create a new query named TX\_EP\_AGY\_EVAL\_APPR\_STATUS to identify second-level approvers for evaluations that were submitted for approval but are still pending. The query will include several prompts for search parameters and will display detailed information.
  - **SR 28005** – Add checkpoints to the Document Status query.
    - User Story: *As an Agency Administrator, I want to view the detailed status description on the TX\_EP\_AGY\_EMPL\_EVAL\_DOC\_STATUS query, so that I can manage the document status more efficiently.*
    - Proposed Solution Summary: Update the Document Status query to display the detailed status for Track Progress steps and the associated due dates. The update adds three new columns to the report in all production and non-production environments: checkpoint status, checkpoint number and checkpoint due date.
  - **SR 40860** – Add a date range to the Performance reports.
    - User Story: *As an Agency Administrator, I want to be able to efficiently search and view performance documents using the "Period Begin Date" and "Period End Date," so that I do not search or view the entire database of performance documents for my agency.*
    - Proposed Solution Summary: Add date range prompts for Period Begin Date and Period End Date to several ePM queries, with the date prompts set up as required fields. The search results will include any Period Begin Date within the date range selected.

#### IV. On the Horizon

- Fiscal Year-End (FYE) processing activities were reviewed in preparation for the fiscal year rollover on Sept. 1.
- For FYE processing instructions, schedule and activities, see [CAPPS HR/Payroll Fiscal Year-End Processing Instructions \(FPP T.003\)](#), which can be found on the FMX website under the Fiscal Policies/Procedures (FPP) tab.

- **FYE Processing Dates:**
  - Normal processing will be available until 5 p.m. on Aug. 31. All transactions processed on Aug. 31 are sent to SPRS before the CAPPS team begins the FYE process.
  - The CAPPS system will be unavailable beginning at 5 p.m. on Aug. 31 through Sept. 5 at 8 a.m. during the rollover process.
  - Normal CAPPS activities can resume after the system is made available.
- Each agency will have an SR ticket created for its FYE activities. This ticket is used to capture all communication and documentation required to complete the FYE processing.
- Important dates for uploading information to the agency's SR include:
  - **Aug. 4** – Test mass reorg spreadsheets must be attached to the SR by Aug. 4 in order for the CAPPS Production Support staff to perform a test and provide results to the agency for validation.
  - **Aug. 18** – FINAL mass reorg spreadsheets must be attached to the SR no later than Aug. 18.
  - **Aug. 22** – Test budget load spreadsheets must be attached to the SR by Aug. 22 in order for the CAPPS Production Support staff to perform a test and provide results to the agency for validation.
  - **Aug. 31** – FINAL budget load spreadsheets must be attached to the SR no later than Aug. 31.
  - **Sept. 5** – the 100% Open Enrollment file is to be provided on Sept. 5. Agencies need to review the CAPPS ERS Inbound Results for errors and spot-check employees' benefit elections.
- The FYE Activities checklist will be included in each agency's FYE SR ticket.

**Note:** For agencies that deployed in May 2023, emergency leave data recorded in USPS or provided during deployment (for agencies not using USPS leave accounting) was converted to CAPPS and is included in the CAPPS query.

## V. Open Forum Q&A

- Using the Slido polling feature with multiple-choice answers, attendees were asked: *What does CAPPS stand for?*
- 84% of respondents selected the correct answer: Centralized Accounting and Payroll/Personnel System.

## VI. Deep Dive Topics

- Details and activities related to the implementation of the legislative salary increase provided under SB 30 were reviewed.
  - The 88th Legislature, Regular Session, provided appropriations for salary increases for state agency employees in fiscal 2024 and fiscal 2025 with supplemental appropriations to increase the salary for two months in fiscal 2023.
  - Provisions in SB 30 provide funding in fiscal 2023 for two months of the salary increase authorized in the GAA to accelerate the effective date of the increase to July 1, 2023. There will not be an additional increase effective Sept. 1, 2023.
- For details and other resources, see [Guidelines for the Salary Increase for Certain State Positions \(FPP F.017\)](#), which can be found on the FMX website under the Fiscal Policies/Procedures (FPP) tab.
- The CAPPS system will be unavailable beginning at 5 p.m. on June 30 to facilitate system maintenance required to implement these changes. Before 5 p.m., agencies must:
  - Validate all employees have been appropriately updated for the June transactions, which includes:
    - Verifying that all July 1 terminations have been entered.
    - Reviewing employees on Disciplinary Reduction (027) and Temporary Assignment (041). If these employees will be restored/returned with an effective date prior to July 1, agencies must enter the appropriate action.
  - Make any date-sensitive June entries.
  - Approve any payroll documents.

- For any July 1 Job Data changes **after the system is available on July 3**, agencies must adhere to the following guidelines:
  - Do **not** update the DTA/XXX row.
  - Any necessary July 1 actions must be sequences **after** the DTA/XXX row.
  - Return employees back to Disciplinary Reduction or Temporary Assignment (if applicable).
  - Determine if any job postings need to be updated to accommodate the new salary changes.
- Additional information is available through the following resources:
  - FPP F.017 contains a Frequently Asked Questions section.
  - [Processing Supplemental Appropriations and Reductions \(FPP A.047\)](#) has been updated with instructions for USAS and CAPPs to reflect SB30, 88th Legislature, Regular Session. Affected state agencies and institutions of higher education must complete these profiles and transactions by July 31.
  - [Appropriations for the Salary Allocation for Certain State Positions \(FPP A.009\)](#) provides additional detail.
  - See [Classification Salary Schedule for Fiscal 2022-23](#) (Effective July 1—Aug. 31, 2023) for the updated salary schedules and [Reason Code Resources and Classification Salary Schedules](#) for more information.

## VII. Wrap-up/Close Meeting

- Upcoming meeting: Thursday, July 27, 2023 —CAPPs HR/Payroll and Financials (Combined) User Group meeting.
- To submit ideas or suggestions for future user group discussion, email [capps.product.team@cpa.texas.gov](mailto:capps.product.team@cpa.texas.gov).
- To be added to the distribution list for the user group meetings, email [capps.cgc.ba@cpa.texas.gov](mailto:capps.cgc.ba@cpa.texas.gov).