CAPPS HR/Payroll User Group Meeting

Tuesday, Oct. 24, 2023
9–10:30 a.m.
(Webinar Only)

I. Welcome/Announcements

- This month's icebreaker question asked:
  "*Does your agency use an internal shared mailbox or Distribution List to receive CAPPS information from CPA?*"
  - 19 percent of respondents indicated that they do.
  - 63 percent said they do not.
  - 18 percent were unsure.

II. Announcements and Reminders

- Clean-up of unused queries (private queries not run for at least 30 months or owned by individuals who are separated for more than 12 months) begins this month.
  - The first HR/Payroll query deletion occurs on **Oct. 30**.
  - Thereafter, deletion occurs on the **20th of every month** through a Control-M job.
- Reminder to agencies that 2023 fiscal year-end activities are winding down.
  - All time and labor fiscal year-end activities should be complete.
  - The Federal budget load spreadsheet is closing out **in October**.
- Reminder to agencies of the *Equal Employment Opportunity (EEO) Report* key dates:
  - Preliminary report is available on **Oct. 19**.
  - Acknowledgement form is due to CPA by **Oct. 26**.
  - Deadline to submit corrections is **Oct. 27**.
  - Final EEO report is available on **Oct. 31**.
- The State Employee Charitable Campaign (SECC) employee enrollment phase closes on **Oct. 31**.

III. Production Updates

- HR/Payroll SR Summary Data for September 2023 included 657 new tickets opened and 677 closed. There were 792 tickets carried forward from September into October.
- The HR/Payroll release for October includes five new requests that include three bug fixes and two improvements. Migration of 14 requests occurred on Sept. 14 with the remaining seven migrating on Sept. 28. Highlights of these changes:
  - A bug fix to the benefits saving management process for employees who are over 50 years old so that they can contribute more than the standard year-to-date amount when changing agencies. (**SR 47625**)
  - An improvement to the Payroll Doc Approval page, which displays documents that are still pending an approval, to better sync with SPRS. (**SR 45997**)
- The HR/Payroll Production Release SRs for November migrates to Production on Nov. 2 and Nov. 16, with a total of 20 items being implemented. Highlights of the November release:
  - A bug fix to the edit to ensure a rate increase is occurring when keying a promotion or 020 transaction for an employee also moving from part-time to full-time so that statutory rules are applied regarding a promotion. (**SR 41490**)
    - UAT (user acceptance testing) occurs Nov. 13–17.
    - Implementation is expected on Nov. 30.
  - A bug fix on the Hazardous Duty Flag to update successfully when using correct history and toggling the position number. The Hazardous Duty Flag will reflect the correct information when an HR User has a manual update. (**SR 47413**)
    - UAT occurs Oct. 23–27
    - Implementation is expected on Nov. 2.

- A bug fix to allow Federal Fund Administrators to enroll an employee as Federally Funded as of the exact hire date so that the employee can be tracked as Federally Funded even if they are not hired on the first day of the month. (**SR 40215**)
  - UAT occurs Nov. 6–10.
  - Implementation is expected on Nov. 16.
- An improvement that allows ePM Administrators to efficiently search and view performance documents using the *Period Begin Date* and *Period End Date* so they do not have to search or view the entire database of performance document for their agency. (**SR 40860**)
  - UAT occurs Nov. 2–10.
  - Implementation is expected on Nov. 16.

- For the new functionality being implemented in November, five changes are highlighted for agency testing during UAT. The functionality and acceptance criteria:
  - **SR 47941** – Enhance the ESS Employee Monthly Time Report so that the page does not have to be refreshed to change report parameters.
    - Acceptance Criteria: After running an EMTR, the *Report Generated* pop-up message displays with the **OK** button. Select **OK** on the popup message and the **Run Report** button is grayed out (disabled) but is re-enabled when run parameters are changed.
  - **SR 14904** – Provide accurate employee and state match contribution amounts on the State Matching Contributions Report.
    - Acceptance Criteria: The employee-level costs associated with state contributions, such as: state-paid taxes; state-paid insurance; and state-paid retirement, including distribution details accuracy by PCA (Class) within the fund, by fund, then total by company. For complete acceptance details, access the SR in the ASP Solution Center.
  - **SR 44529** – Improve the monthly longevity report to remove duplicate results and accurately calculate longevity for employees with LWOP.
    - Acceptance Criteria: Verify the employee does not appear twice or is duplicated in the report. Verify the report can be generated using the Excel output option with Company and Department listed as the first two columns in the Excel output.
  - **SR 44403** – Improve the FMLA Balance Inquiry to only include days and hours designated as FMLA following the removal of the FMLA ID from a transaction.
    - Acceptance Criteria: Log into CAPPS as a user with Superuser timesheet access. Pull up an employee’s timesheet with approved FMLA entries. Remove an FMLA entry from a particular day and enter time using a non-FMLA TRC for the same day. Submit and approve the time entry. Run Time Administration and FMLA balance process. Validate the FMLA time entry removed from the timesheet is reflected on the FMLA balance inquiry page for the employee.
- Submitted six enhancements for a vote to add them to the CAPPS HR/Payroll baseline. See the following SRs and short descriptions from the ASP tool, along with the user story and proposed solution:
  - **SR 7357** – Veterans Medical Health Leave
    - User Story: As a CAPPS TL Super User, I want the ability to award and track the balance for Veteran's Medical Health Leave so that employees do not go over the statutory 15 days and any additional days the agency administrative head may award.
    - Proposed Solution Summary: Set up a new Comp Time plan to administer veteran's medical/mental health leave like any other Comp Time Off Plans.
  - **SR 20684** – Change Reported Time All Query to be More Streamlined
    - User Story: As a Time and Labor Super User, I want to see the employee’s manager’s name, the Department ID and the Department Name on the TX_TL_REPORTED_TIME_ALL query results so that I can identify all relevant data when reviewing the results.
    - Proposed Solution Summary: Add requested fields (Employee’s Manager’s Name field; Department ID field; Department Name field) and remove six non-beneficial fields (Number; Task group; Task Profile ID; User_5; Sync ID; Last Update Date/Time [that reflects nightly Time Admin run or replicates other DTTM fields]). Change field names where necessary to better describe the data displayed.
  - **SR 20697** – Add Name to the Payable Time by TRC Agency Query
    - User Story: As a TL Super User, I want to see the Employee Name on the TX_TL_PAYABLE_TIME_BY_TRC_AGY query results so that I can easily identify what employees are included when reviewing the results.
    - Proposed Solution Summary: Add the Employee Name to the TX_TL_PAYABLE_TIME_BY_TRC_AGY query results.

- **SR 25602** – Licensure Query
  - User Story: As a Core Human Resource (HR) User, I want to see the employee Name on the TX_HR_AGY_LICENSE_CERTIFS query results so that I can identify what employees are included when reviewing the results.
  - Proposed Solution Summary: Add the employee Name field to the TX_HR_AGY_LICENSE_CERTIFS query results.
- **SR 28858** – Add legislative CT plans to CT/OT Earned Report
  - User Story: As a TL Super User, I want the ability to run the CT/OT Earned report for Legislative CT so that I can view Legislative Comp Time earned.
  - Proposed Solution Summary: Add the Legislative Comp Time plans (COMPTTM24 and COMPTTMLEG) to the Comptime/Overtime Earned Report. Exclude non-employees from the report.
- **SR 31405** – Add Dept Name to the Leave Balances by Agency Report
  - User Story: As a TL Super User, I want to see the Department Name on the Employee Leave Balances by Agency report so I can identify what department employees are in when reviewing the report results.
  - Proposed Solution Summary: Add the Department Name field to the Employee Leave Balances by Agency report.

IV. On the Horizon

- Provided an update regarding DIR's security enhancements to the TDIS login process utilized by CAPPS:
  - Currently, the TDIS Forgot Password functionality allows email as a method for account verification.
  - The security enhancement removes email as a method for account verification.
  - Encouraged users to set up security questions and/or a mobile phone set up as a verification option in TDIS to use the self-service password reset.
  - Agency DAs are still able to generate password reset emails as an alternative.
  - Change goes into effect on **Oct. 30** for TDIS Stage (CAPPS UAT/MNT) and on **Nov. 9** for TDIS Production (CAPPS PRD).
  - Related — TDIS system updates to implement the risk-based adaptive authentication (RAA) go into effect on Oct. 26 in passive mode (no impact to users). RAA enters active mode in TDIS Stage on **Nov. 28** and active mode in TDIS Production on **Dec. 14**.
  - DIR is planning additional development presentations for TDIS. The CAPPS Communication team will share information as it becomes available.
  - Recommend communicating to all CAPPS users about these changes and how individuals should prepare.

V. Features and User Spotlights

- Adding General Deductions and Direct Deposit Information to records, available to query in Query Manager on **Nov. 16**. A new security profile including the records TX_HCM_QRY_GENL_DEDUCTION and TX_HCM_QRY_DIR_DEPOSIT is automatically granted to Payroll Processors. Other query users can be granted these records through a security request. For complete details, refer to **SR 49067**.
- To help agencies announce eConsent for W-2 and 1095-C year-end forms and to provide additional campaign information to agencies' employees, CAPPS team sent out a toolkit containing an Electronic Consent Desk Aid, the campaign flyer and suggested language for agencies to use to launch their campaigns.
  - Agencies can run the TX_YEAR_END_CONSENT_REPORT query to view consent status for active employees.
  - Like other queries, results can be:
    - Displayed in the browser via HTML
    - Downloaded as an Excel
    - Run as an XML file

VI. Open Forum Q&A

- Attendees were asked:
  "*At your agency, what percentage of staff have already consented to electronic delivery of W-2 and/or 1095-C for tax year 2023?*"
- Attendees were given time to run the TX_YEAR_END_CONSENT_REPORT query.
  - 84% indicated that at least half of their staff have already completed electronic consent.
  - 16% indicated that less than half of their staff have done so.

VII. Deep Dive Topics

- Presented the 2023 Calendar Year-End Processing:
  - To prepare, agency payroll processors need to verify or update contact information for both W-2 and 1095-C by **Dec. 31** (after the CAPPS Support staff have populated the row for 2023).
    - To verify or update W-2 contact information:
      1. Navigate to **Payroll for North America**.
      2. Select **U.S. Annual Processing**.
      3. Select **Define Annual Tax Reporting**.
      4. Select **W-2 Company Data**.
    - To verify or update 1095-C contact information:
      1. Navigate to **Payroll for North America**.
      2. Select U**.S. Annual Processing**.
      3. Select **ACA Annual Processing**.
      4. Select **Manage Agency Contact Info**.
  - W-2 Forms are expected to be available in CAPPS on **Jan. 12, 2024**.
    - CAPPS reports W-3 totals to SSA on behalf of Central Agencies on or before **Jan. 31, 2024**.
  - 1095-C Forms are expected to be available in CAPPS on **Feb. 16, 2024**.
    - CAPPS reports 1095-C totals to SSA on behalf of Central Agencies on or before **Mar. 31, 2024**.
  - Employees participating in the State Employee Charitable Campaign (SECC) can pledge until **Oct. 31**.
    - CAPPS Production Support team loads the file the week of **Nov. 27**.
    - Agencies can refer to the SECC Desk Aid (sent out in September) to resolve SECC load errors.
  - CAPPS allows employees that are eligible for Benefit Replacement Pay (BRP) to change their leveling election for the next calendar year in Employee Self Service during an open enrollment period.
    - Employees who want to change their BRP leveling election must make the change in CAPPS from **8 a.m. on Nov. 20** through **5 p.m. on Dec. 1, 2023**.

VIII. Wrap-up/Close Meeting

- **Next Meeting:** Thursday, Nov. 30, 2023 — CAPPS HR/Payroll and Financials (Combined) User Group meeting.
- Please note that CPA will be closed **Wednesday, Nov. 22 — Friday, Nov. 24**.
- Submit ideas or suggestions for future user group discussion to: 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