

CAPPS HR/Payroll User Group Meeting

Tuesday, Jan. 23, 2024

9–11 a.m.

(Webinar Only)

I. Welcome

- This month's icebreaker asked attendees to finish the sentence: "This year I will..."
- Attendees used the polling feature of the Webex Slido application to select a response among three primary categories:

II. Announcements and Reminders

- Calendar year-end activities are beginning to wrap up. The remaining activities and key dates:
 - Jan. 19: Printed W-2 forms are available for pick-up.
 - Jan. 31: CAPPS Production Support will run transmittal totals for Internal Revenue Service (IRS) wage reporting.
 - Feb. 23: Printed 1095-C forms are available for pick-up.
 - March 31: CAPPS Production Support will run transmittal for IRS 1095-C reporting.
 - Since the November user group meeting, employees at all agencies consenting to receive their year-end tax documents electronically increased by six (6) percent.
- The Department of Information Resources (DIR) continues progress toward improving security for CAPPS by enhancing the Texas Digital Identity Solution (TDIS). Active Mode for risk-based third-factor authentication will roll out as follows:
 - Non-production CAPPS environments begin Active Mode on Tuesday, Jan. 23.
 - Production CAPPS environments begin Active Mode in mid-February. DIR will confirm the date soon.
 - Please encourage all users to register additional multiple-factor authentication (MFA) methods on the [TDIS portal page](#).
- Business Objects (BOBJ) and PeopleSoft (CAPPS) upgrades are coming this summer. The new images will be available for agency user acceptance testing (UAT) from May 6 through June 14, and the images go live in Production on June 24.
 - BOBJ will upgrade from version 4.2 to 4.3 and will provide a new user interface with improved methods for accessing and organizing reports. Training will be provided before UAT begins.
 - PeopleSoft will upgrade from image 40 to image 47.
 - More information about both upgrades will be shared in future user group meetings.

III. Production Updates

- The HR/Payroll support request (SR) data for December 2023 included 502 new tickets opened and 575 tickets closed. There were 711 tickets carried forward from December into January 2024.
- The HR/Payroll release for January includes 17 new requests that include nine bug fixes, five features and three improvements. Highlights of these changes:
 - A new feature including two new queries, TX_PY_AGY_GENL_DED_AUDIT (Agency General Deduction Audit) and TX_PY_AGY_CUP_AUDIT (Agency Credit Union Deduction Audit), that will display General Deductions so that each agency can see employees with these deductions as well as any updates. **(SR 32162)**
 - A bug fix that enables Employee Self-Service (ESS) users to update their existing direct deposit instructions if they had previously exempted themselves so that the current or new instructions are saved with an active status. **(SR 49501)**
 - An improvement to allow Time and Labor superusers to run the Comp Time/Overtime Earned report for Legislative Comp Time. **(SR 28858)**
- The HR/Payroll Release 1 for February includes 19 requests that include 11 bug fixes and eight improvements. UAT for this release will take place Jan. 29 through Feb. 2, and deployment is scheduled for Feb. 8.
- The HR/Payroll Release 2 for February includes eight requests that include six bug fixes and two new features. UAT for this release will take place Feb. 12 through Feb. 16, and deployment is scheduled for Feb. 22.
- For the new functionality to be implemented in February, three changes are highlighted for agency testing during UAT. Functionality and acceptance criteria:

- **SR 6941** – A request to add Judicial and Attorney Longevity to the Projected Longevity Report. This request is included in Release 1.
 - Acceptance criteria: Payroll processors can successfully run the new Projected Longevity Report for Attorney Longevity (ALO) and Judicial Longevity (JLO) to validate the projection of the wages per the rate codes entered on the Additional Pay Data page.
- **SR 47371** – A bug fix to improve the performance of the View Exceptions and Reported Time pages of the Time and Labor Work Center. This request is included in Release 2.
 - Acceptance criteria: All results display within seconds on the Time and Labor Work Center – View Exception and/or Reported Time pages for Time and Labor Superusers, Time Administrators, Managers, and Decentralized Superusers.
- **SR 49830** – A request to prevent users from adding job codes that are inactive at the state level. This request is included in release 1.
 - Acceptance criteria: Added controls to ensure that edits to Agency Level Job Codes consider the job code’s effective status at the state level. Updates to Agency Level Job Codes will now prevent users from creating Active Job Codes whenever the State Level Job Code is Inactive.
 - New agency job codes default to “inactive” status whenever the corresponding State Level Job Code is inactive. Changes may be made to current Agency Level Job Codes; however, if a future-dated inactive row exists at the state level, an additional corresponding row is created at the agency level.
- Submitted four enhancements for a vote to add to the CAPPs HR/Payroll baseline. The SRs and their short descriptions from the ASP tool, along with the corresponding user stories and proposed solutions:
 - **SR 14886** – Holiday Hours Earned for Unscheduled Workdays
 - User Story: *As a Time and Labor (TL) user, I want to earn Holiday Comp Time when working on a holiday even though I’m not scheduled to work on that day so that the hours paid are from the correct comp time bucket.*
 - Proposed Solution Summary: Modify the existing timesheet edit that restricts employees from keying REGHW hours on an employee’s unscheduled day that’s also a holiday. Instead, update the edit logic to limit the user from keying REGHW hours greater than the employee’s eligible holiday hours.
 - **SR 16670** – ERS/CAPPs Insurance Recon Report
 - User Story: *As a benefits coordinator, I want additional data on the ERS/CAPPs Reconciliation Report and to be able to download the report in Excel format so that I can share it with other benefit coordinators in our agency.*
 - Proposed Solution Summary: Update the ERS/CAPPs Reconciliation Report to include the employee’s department information; sort the report by the “Retiree?” field; enable the report to be downloaded to Excel; modify the HTML version of the report for 508 compliance.
 - **SR 23058** – Employee Biosketch Report Updates
 - User Story: *As a Core Human Resources (HR) User, I want the Employee Biosketch Report to be sorted by name and to have the ability to process for both terminated and active employees so that I can easily find the employee.*
 - Proposed Solution Summary: The Employee Biosketch Report parameters will be modified to include a choice of active/inactive/both employees when running the report by Dept ID. In addition, when running by Dept ID, the output will be sorted by employee’s last name, first name, and middle initial unless both active and inactive are selected. When the report is run by Dept ID and both active and inactive employees are requested, results will be ordered by active employees first in name order, then inactive employees in name order.
 - **SR 44593** – Add Prompt in Term Query
 - User Story: *As a Core Human Resources (HR) User, I want to be able to query terms by effective date, so that I can ensure I capture all terminations in a specific period.*
 - Proposed Solution Summary: The current TX_HR_AGY_TERMS query will be modified to include new date range prompts for EFFECTIVE DATE FROM field and EFFECTIVE DATE TO field in addition to the existing ACTION DATE FROM field and ACTION DATE TO field.

IV. On the Horizon

- The CAPPs roadmap highlights future CAPPs development over an extended period. The items highlighted on the roadmap:
 - System and policy updates to streamline how prior state service is recorded and verified.
 - A strategy to enable agencies to employ third-party reporting tools using live data.
 - Deployment of image and tools upgrade. One noteworthy aspect of the upgrade will address the placement of the plus and minus buttons to add and delete rows on the Employee Self-Service (ESS) timesheet.
 - Proactive efforts to employ data masking so that personally-identifying information (PII) is only visible when necessary and PII data views are logged.

- Replacement of the Service Desk Management system commonly referred to as ASP.
- Modernization of legacy systems including the Uniform Statewide Accounting System (USAS) and the Texas Identification Number System (TINS).
- Phase 1 of the Prior State Service (PSS) initiative will focus on automating verification for employees who make direct transfers between CAPPs Central agencies.
 - CAPPs will read and update PSS records using existing data.
 - Auto-verified rows will be grayed out and will not need further action by the receiving agency.
 - Auditors will not require verification of PSS that has been auto-verified by the CAPPs system.
 - The PSS page will include a new field called `SYSTEM_VALIDATED`.
 - Agency users still will be able to manually enter PSS information if the employee was employed by a non-CAPPs agency or a CAPPs Hub agency, or if the previous agency was not a CAPPs agency at the time the person was employed there.
 - For additional details, agency Level 1s can review SR 45123. This SR is scheduled for production on April 11.

V. Features & User Spotlights

- The CAPPs Training and Governance team recommends users take advantage of multiple communications resources available to keep updated on CAPPs activities, including meetings and system changes.
 - Across the CAPPs team, several email addresses are used to communicate different types of information that is shared with CAPPs agencies. The following three business mailboxes are used for both sending out information and for CAPPs users to submit questions or request information.
 - CAPPs Governance and Communication – capps.cgc.ba@cpa.texas.gov. This mailbox is the primary mailbox used for CAPPs system information, such as process updates or due dates for business activities, as well as meeting invitations and materials distribution.
 - CAPPs Training – capps.training@cpa.texas.gov. This mailbox is used to announce upcoming training courses, news, or updates about online training materials, distribution of course materials, or other information related to CAPPs training activity.
 - CAPPs Product Team – capps.product.team@cpa.texas.gov. This mailbox is used as the primary contact for the Product Team, fielding any general questions about the CAPPs program overall or for agencies inquiring about CAPPs module implementation or other module-related program information. This mailbox is not used for reporting system issues or ticket requests that should go through the Level 1 SR process.
 - In addition to the business mailboxes, CAPPs Communications is also expanding its use of distribution lists via ListServ accounts. These accounts are outbound-only distribution lists that allow Communications to send emails to large audiences from a single distributor email address.
 - The ListServ accounts used for CAPPs Communications will show the email sender information as coming from the domain “@listserv.cpa.state.tx.us”.
 - Presently, the team has ListServ accounts for the various Agency Level 1 groups and the TDIS Delegated Administrators (DAs).
 - End users are advised to ensure all of the email addresses noted here are tagged on their “Safe Senders” lists and are not being deleted by spam filters. In some instances, users may need to work with their agency’s IT department to prevent firewall filters from blocking the messages.
 - In addition to email notifications, all users have access to a wide variety of resources that can be found on the [CAPPs](#) system page on the [Fiscal Management \(FMX\) website](#). Some of these resources include:
 - CAPPs System Changes page: A list of changes implemented in the CAPPs Production system, going back two years.
 - FMX Calendars/Schedules: Calendars that include fiscal activities as well as system downtime, meeting dates, etc.
 - CAPPs Contacts and Help page: General resource information that includes lists of all agency Level 1s and Delegated Admins for each agency.
 - User Group Meeting pages: Each user group has a home page in FMX that includes the upcoming meeting information, the names of the group’s committee members, and a two-year archive of meetings that contains the agendas and other materials from the previous meetings.
- Enhancements to the Family Medical Leave Act (FMLA) event status reports are in development.
 - Currently, there are five FMLA event status reports:
 - Closed/Expired Events
 - Closed/Expired Events-Terms
 - Closed/Unexpired Events

- Open/Unexpired Events
- Open/Unexpired Events-Terms
- To gauge the usefulness of the FMLA event status reports, The CAPPs team solicited input from user group attendees.
 - Attendees used Slido polls to rate how frequently they ran the Closed/Expired Events report and the Closed/Expired Events-Terms report. Of those who answered, roughly half indicated they never ran these reports, 40% of respondents rarely or occasionally ran them. A small percentage reported running these reports frequently. This information will be provided to the CAPPs team for additional consideration.
- Two new FMLA status reports are in development:
 - Open/Unapproved Events
 - Denied Events
- The option to export FMLA status reports to Excel is in development.

VI. Open Forum / Q&A

Attendees responded to the question: “For future user groups, what other topics would you like to see as deep dives, or what other agencies/programs would you like to hear about?” Responses will determine future user group content.

VII. Wrap-up/Close Meeting

- The next user group meeting is a combined meeting with both HR/Payroll and Financials groups on Tuesday, Feb 27, 2024.
- 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