

# CAPPS HR/Payroll User Group Meeting

Tuesday, March 26, 2024

9–11 a.m.

(Webinar Only)

## I. Welcome

## II. Announcements and Reminders

- Business Objects (BOBJ) and PeopleSoft (CAPPS) upgrades are coming this summer.
  - BOBJ upgrading from version 4.2 to version 4.3, which provides a new user interface with improved methods for accessing and organizing reports.
  - HR/Payroll PeopleSoft upgrading from image 40 to image 47.
  - Financials PeopleSoft upgrading from image 41 to image 48.
  - The BOBJ team will present an overview and demonstration of version 4.3 at the **April 25** user group meeting.
  - The upgrades will be available for agency User Acceptance Testing (UAT) **May 6—June 14**, with migration planned to Production on **June 24**.
- Texas Workforce Commission (TWC) will perform maintenance on the Work In Texas (WIT) job matching system on Wednesday, April 10, at 6 p.m. through the morning of Monday, April 15th. During this time, the following activities will be suspended:
  - Processing of job postings
  - Creation of State of Texas Applications (SOTA)
  - Applications to postings will be suspended
- Jobs created by Recruit agencies during this time will be held from transmission to WIT until the matching system maintenance is complete.
- CPA offices ( including CAPPS Production Support/CAPPS Help Desk) are closed on Friday, March 29 in observance of the Good Friday holiday. The CAPPS Production environments remain available during this time. If an agency experiences a critical outage during this closure, Level 1 Support staff may contact the CAPPS Help Desk by opening a Critical ASP ticket. All other general inquiries will be addressed when the office reopens on Monday, April 1 for regular business hours (8 a.m.–5 p.m.). For agencies that remain open, the Agency Level 1 Support staff need to address any support questions from their CAPPS users.

## III. Production Updates

- The HR/Payroll SR Data for February 2024 included 727 new tickets opened and 836 tickets closed. There were 604 tickets carried forward from February into March. The modules with the bulk of carry-forward tickets are Human Resources and Time and Labor.
- The HR/Payroll release for March includes 16 new requests that include six bug fixes, two features and eight improvements. Highlights of these changes:
  - A bug fix to correct the “reports to” display in Manage Position. **(SR 42124)**
  - A new query to provide pertinent current Manage Job information for an employee followed by information on the employee’s previous Manage Job row so Core Human Resources (HR) users can quickly review the employee’s current Manage Job information and compare it to their prior Manage Job row. **(SR 45678)**
  - An improvement to the Leave Liability Report by Fund (TXETL00022) to display correct PCA and Fund information based on the funding sources and produce the report by the Department, even if the agency does not have the Department Budget Table set up. **(SR 50357)**
- The HR/Payroll Release 1 for April contains 14 requests that include five bug fixes, eight improvements and one new feature. UAT for this release is April 1–5 with Deployment scheduled on April 11.
- The HR/Payroll Release 2 for April contains 10 requests that include seven bug fixes and three improvements. UAT for this release is April 8–12 with Deployment scheduled on April 25.

- For the new functionality being implemented in the April releases, three changes are highlighted for agency testing during UAT. The functionality and acceptance criteria:
  - **SR 41748** – A request to add data validation for the FTE INDICATOR and STANDARD HOURS values in Modify Position. This request is included in Release 2.
    - Acceptance Criteria: When adding/updating rows in Modify Position, an error is received and does not allow a user to save the transaction if the ADDS TO FTE ACTUAL COUNT field is set to **Yes** and the FTE INDICATOR value is inconsistent with the STANDARD HOURS designated for the position. The user is allowed to save the transaction when the ADDS TO FTE ACTUAL COUNT field is set to **No**, even if the FTE INDICATOR value is inconsistent with the STANDARD HOURS designated for the position. An error is received and does not allow a user to save the transaction if the STANDARD HOURS is 40 and the FULL/PART TIME field is **P** or if the STANDARD HOURS value is less than 40 and the FULL/PART TIME value is **F**.
  - **SR 44619** – A request to ensure that the Employee Monthly Time Report correctly calculates all Comp Time ending balances correctly. This request is included in Release 1.
    - Acceptance Criteria: Users are able to see the Veteran Medical Health Leave (VMHL) comp time plan displayed with proper balances on the third row of the first page of the report. Validate Expiring/Lost hours are displayed and are calculated appropriately in the leave balances section for all comp time plans. Hours reported with HCMPI/HCMPO/EAHRI/EAHRO TRCs on a time sheet will update the balances appropriately.
  - **SR 50928** – A request to provide a list of paychecks for an employee on the CPE Main page. This request is included in Release 2.
    - Acceptance Criteria: Payroll Processors can successfully enter a Returned Money transaction using the correct original Check Number on the CPE Main page. Once a CHECK NUMBER is selected from the prompt list, the system auto-populates the CHECK DATE, GROSS PAY, and NET PAY. If an invalid CHECK NUMBER is entered, a “*Check Number entered doesn’t match with any existing positive pay USAS Accepted checks. Do you want to proceed?*” warning message displays and should allow the user to continue with the transaction.
- Two enhancements are submitted for a vote to be added 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 are:
  - **SR 9030** – Add Fields to TX\_TL\_AUDIT\_REPORTED\_TIME Query
    - *User Story: As a TL Superuser, I want to add fields to the TX\_TL\_AUDIT\_REPORTED\_TIME query, so that the output provides additional needed information.*
    - Proposed Solution Summary: The agency is requesting that the following fields be added to the TX\_TL\_AUDIT\_REPORTED\_TIME query: Employee’s name in reporting format (Last Name, First Name Middle Name); User ID name in reporting format (Last Name, First Name Middle Name); ORC; Comments.
  - **SR 51646** – Update the Document Approval Status Query
    - *User Story: As an ePM Administrator, I want to run a query to identify an employee’s approving manager, so that I can efficiently monitor the employee’s performance document status.*
    - Proposed Solution Summary: Update the various field names and formatting and add additional fields to aid in sorting and filtering the managers associated with the document’s approval workflow.

#### IV. On the Horizon

- Some system-generated emails triggered during the workflow are sent using the user’s email address, rather than a system *No-Reply* email address.
  - Updated these so system-generated emails are sent from the **CAPPs No-Reply** email address.
  - This configuration change will be implemented (in UAT) separately from the regular Release Schedule, with migration to Production in April. Updates are communicated through **SR 53441**.
- The CAPPs HR/Payroll PeopleSoft Image is upgrading from PUM 40 to PUM 47 on June 24, 2024. Concurrently, HCM PeopleTools and ELM PeopleTools are upgrading to version 8.60.xx. Some highlights of the new image:
  - Navigational changes: relocate the **Recent** and **Favorites** icons to the top banner and change the appearance of the **Back** button.
  - Searches can be saved, allowing users to reuse recently keyed searches.
  - Add a global search feature to the top banner.
  - New Insights Dashboards available for managers, which include the ability to drill down selected datasets.
  - A new lockdown framework allows the CAPPs Support team to quickly lock down components to read-only.
  - Add Remote Worker functionality.
  - Improvements to the Fluid Timesheet repositions the plus (+) and minus (-) buttons to the left of the scrolling area and add a **View By** option to enter time by week or month.

- Display the Employee Header fields on Time and Labor Fluid pages (Time Summary, Payable Time, and Leave Balances) more consistently.
- Time and Labor Fluid will retain an employee's context when switching between the Timesheet, Time Summary, Payable Time and Leave Balances pages.
- Improve PDF versions of W-2 forms for viewing without enabling a screen reader.
- Implementation of fluid functionality in Performance Management.

## V. Deep Dives

- When a terminated employee has time that is rejected by payroll (RP), the Load Time and Labor process updates the status of that time to Needs Approval (NA). This is called the *Freeze/Inactivate Payable Time for Terminated Employee Process*.
  - This process (TZFRZPYT) references the CAPPs Constants Table Freeze Term EE Time Months (the "Freeze Month") value to determine whether enough time has elapsed before freezing the pay.
    - The standard options for the FREEZE MONTH are **0** (zero) and **2**. These values designate how many months the time is allowed to remain in **RP** status before being changed to **NA**.
    - For most agencies, the default setting for FREEZE MONTH at deployment is **0**.
    - When the agency's FREEZE MONTH is set to **0**, the pay is frozen on the first on-cycle payroll. If it is set to **2**, the pay remains in RP status for two months before being frozen.
  - The CAPPs team recommends that agencies set the FREEZE MONTH to a value of **2** to allow for the RP time to be addressed before being frozen.
  - The CAPPs Support team will provide a list of all agencies' FREEZE MONTH values.
  - If an agency wants to change its setting for FREEZE MONTH to **2**, the agency should append a note to **SR 53558** by Friday, **April 5, 2024**, at 5 p.m.
  - Production updates will be entered by the CAPPs Support team on Friday, **April 12, 2024**.

## VI. Wrap-up/Close Meeting

- **Next Meeting:** Thursday, April 25, 2024 — CAPPs HR/Payroll and Financials (Combined) User Group Meeting.
  - The BOBJ team will present an overview and preview demonstration of version 4.3.
- Submit ideas or suggestions for future user group discussion to: [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)

## VII. Post-User Group Special Event

- Following the user group meeting, the CAPPs team hosted a special event focused on retirement for Group 3 employees with a guest speaker from the Employees Retirement System of Texas (ERS).
- Group 3 employees are those who became members of ERS between Sep. 1, 2013—Aug. 31, 2022.
- At the time of retirement, Group 3 employees are required to declare whether they want to apply any remaining (unused) annual leave towards increasing their annuity or receive a lump sum payment for the unused annual leave hours.
  - Once the member's retirement is approved, ERS sends the ERS Annual Leave Payment Option Form (2.974F) to the employing agency.
  - The payroll officer at the agency completes and returns form 2.974F to ERS.
  - ERS receives and processes the completed form 2.974F.

**Note:** If the member selects to have the annual leave included in the annuity calculation on form 2.974F but then receives a lump sum payout from the agency, ERS will recalculate the annuity accordingly.

- The Group 3 presentation included a question and answer session. A **Frequently Asked Questions** (FAQs) document will be provided for reference via the HR/Payroll User Group distribution list shortly after the meeting.