

CAPPS HR/Payroll User Group Meeting

Tuesday, July 23, 2024

9–10:30 a.m.

(Webinar Only)

I. Welcome

II. Announcements and Reminders

- As we approach the fiscal year-end, note the following due dates for preparatory actions:
 - Test Mass Reorg spreadsheets — due **Aug. 2, 2024**
 - Test Budget Load spreadsheets — due **Aug. 9, 2024**
 - Final Mass Reorg spreadsheets — due **Aug. 16, 2024**
 - Final Budget Load spreadsheets — due **Aug. 23, 2024**

Note: Agencies can open a Service Request (SR) to request a mass reorg spreadsheet or budgeted load spreadsheet (BLS) template.

- Fiscal year-end 2024 processing schedule:
 - Normal processing is available until Friday, **Aug. 30, 2024 at 5 p.m.**
 - All transactions processed on **Aug. 30** are sent to the Standardized Payroll/Personnel Reporting System (SPRS) before the CAPPS team begins the fiscal year-end process.
 - The system will be unavailable **Aug. 30 at 5 p.m.—Sept. 3 at 8 a.m.**
 - Normal CAPPS activities will resume on **Sept. 3 at 8 a.m.**
- User acceptance testing (UAT) for Data Masking in CAPPS is ongoing through **July 26**, with migration to production on **Aug. 4, 2024**.
- All BI-INBOX content, dating back to **Jan. 2023**, has been restored.
- Beginning **Sept. 1, 2024**, the BI-INBOX content will only be retained for 60 days.
- Users that wish to keep content from their BI-INBOX need to move the content to their personal folder.
- See [SAP BusinessObjects 4.3 Training](#) for basic video tutorials.
- The CAPPS logo was refreshed/modernized and will appear on FMX beginning Sept. 1, 2024.

III. Production Updates

- HR/Payroll SR data for June 2024 included 726 new tickets opened and 636 tickets closed. There were 603 tickets carried forward from June into July.
- HR/Payroll release for July includes nine new requests: five bug fixes, one feature and three improvements. Highlights of these changes:
 - Bug fix to add additional edits on the *Agency Job Code Setup*. (**SR 53903**)
 - New feature that adds new fields to the *Reported Time Query*. (**SR 9030**)
 - Improvement to properly calculate Insurance Salary/Annual Base Benefit Rate (ABBR) for employees with concurrent jobs or dual employment. (**SR 14109**)
- HR/Payroll releases for August include 19 new requests across two releases:
 - **Release One** — contains five bug fixes and seven improvements with UAT July 29–Aug. 2 and migration to production scheduled for Aug. 8.
 - **Release Two** — contains five bug fixes and two improvements with UAT Aug. 12–16 and migration to production scheduled for Aug. 22.
 - Highlights:
 - **SR 52976** – additional edits to protect CAPPS service period information on the *Hazardous Duty Prior State Service* scroll area so that a user cannot make changes to *Hazardous Duty Prior State Service* periods that are supported by data that exists in CAPPS.
 - **SR 53092** – some system-generated time reporting codes (TRCs) in payable time have invalid funding information erroneously attached to them, which must be corrected so that when Time and Labor (TL) superusers run the funding reports/queries, only valid funding information entered on the timesheet is displayed.

- For the new functionality being implemented in August’s releases, three changes are highlighted for agency testing during UAT. The functionality and acceptance criteria:
 - **SR 39464** – A request to align the sort fields on TL pages with the data displayed (included in release one).
 - **Acceptance Criteria:** When accessing the TL Manage Exceptions page, the Manager Self-Service (MSS) users, time administrators and superusers can:
 - ◇ Search for exceptions from the search page using different search criteria that result in multiple rows of exceptions for an employee, company or time reporter group.
 - ◇ Validate that the `Sort` field labels are correct on the page.
 - ◇ Use the `Sort` fields to organize the results on the page and validate that it’s working for each field.
 - ◇ Validate that the *Sort Options* pop-up windows have the correct fields to match the data displayed on the page.
- Note:** The MSS Manage Exceptions page loads the open exceptions for the manager’s direct reports.
- **SR 44896** – A request for the *Staffing Forecast* report to provide accurate fiscal year data.
 - **Acceptance Criteria:** Core HR users can run the *Staffing Forecast* report for any agency `BUSINESS UNIT`, `DEPARTMENT` or `POSITION`. Select the **Staffing Forecast Detail** report, use **Run Options = Web/XLS** and review the file to ensure that no negative numbers appear in the column labeled `PROJ EXPEND`.
 - **SR 53275** – A request for the `TX_PY_AGY_PAYROLL_DIST_ERN_END` query to provide correct distribution.
 - **Acceptance Criteria:** Validate a scenario for a combo code that has multiple effective dates and is distributing funding for the prior pay periods correctly.
- Submitted one enhancement for a vote to be added to the CAPPs HR/Payroll baseline.
 - **SR 55354** – New Employees Missing ABBR Query
 - **User Story:** *As a benefits coordinator and/or payroll processor, I want a query to identify employees who do not yet have an ABBR populated on their `MANAGE JOB` row, so that I can correct the employee's information prior to payroll processing and ensure the employee's benefit deductions are accurate.*
 - **Proposed Solution Summary:** Create/add a new query to the **On/Off-Cycle Payroll Checklists** that prompts a user for `COMPANY` and `PAY END DATE` then provides a list of employees based on the prompt information entered with an ABBR of zero (and/or for agencies 101/102 employees in job code 7109 missing a `LIFE ABBR`). Results display the following fields: `COMPANY`; `EMPLID`; `EMPL RCD`; `NAME (LAST NAME, FIRST NAME MIDDLE)`; `LAST_HIRE_DT`; `PAY_END_DT`; `JOB CODE`; `STD_HOURS`; `EMPL_TYPE`; `MONTHLY_RT`; `HOURLY_RT`; `ANNL_BENEF_BASE_RT`; `LIFE_ABBR`; `H_RETIREE_IND`; `HR_STATUS`.

IV. CAPPs Project Updates

The Image and Tools upgrade is 99% complete, with support continuing through the end of August.

V. On the Horizon

- The Lotus Notes-based Application Service Provider (ASP) is being replaced with the new CAPPs Service Desk (powered by BossDesk software).
 - Migration occurs Aug. 9–12, 2024.
 - ASP Solution Centers go offline on **Friday, Aug. 9 at noon**.
 - During migration, Level 1 support staff cannot view any existing Service Desk tickets or create any new tickets. Agencies experiencing critical outages should email capps.help@cpa.texas.gov.
 - Existing open tickets in ASP will be converted into CAPPs Service Desk tickets.
 - The new CAPPs Service Desk becomes available on **Monday, Aug. 12 at 8 a.m.**
 - Training for Central Agency Level 1s, IAM/TDIS delegated administrators and Hub Level 2s will be held the first week of August. Invitations will be sent from capps.training@cpa.texas.gov.
 - All Level 1s are included as Watchers on all tickets submitted from their agency.
 - SRs are submitted from the **Service Catalog**. Options include:
 - Report an Incident
 - Request Information
 - Service or Training
 - Suggest an Enhancement
 - Upgrade & Expansion Project Assistance — only available during special testing times to facilitate large upgrades. Users will be notified when this SR type is *active*.
 - IAM/TDIS Delegated Administrators have a Password Assistance Service Catalog option.
 - All agency Level 1s and Delegated Administrators (DAs) are encouraged to attend an instructor-led training (ILT) session.

- To ensure that email notifications reach Level 1 users, the CAPPs team recommends that the following domains be added to their *Safe Senders* list:
 - For Financials: support@cappsfin.bosssdesk.io
 - For HR/Payroll: support@cappshcm.bosssdesk.io
- Phase II of *Prior State Service* (PSS) automation requires agencies to review PSS information for transferred employees. The following steps ensure that PSS entries can be system-validated:
 - **Step 1:** Analyze PSS Dates in CAPPs — In PSS entries, the termination date must be equal to the last day of employment.
 - **Step 2:** Correct discrepancies for termination date data in PSS rows — confirm the last day of employment with the previous agency where the employee worked and correct data (as applicable).
 - **Step 3:** The CAPPs team sets the *System Validated* flag to **Yes** on all historic PSS rows inserted by the PSS process.

VI. Features & Spotlights

- CAPPs provides the ability to record and track *Disciplinary Actions* or *Grievances* to:
 - Deliver effective tracking of disciplinary actions and grievances within CAPPs.
 - Allow recording and monitoring of misconduct or grievances raised by employees.
 - Enable management to track the progress of disciplinary actions and grievances.
 - Maintain a comprehensive database for future reference and analysis.
- Texas' Employee Retirement System (ERS) sends a daily file of changes and new enrollments for employee insurance elections.
 - When new enrollments or changes are entered into ERS, they are transmitted to CAPPs via this daily inbound file.
 - The ERS file is loaded into CAPPs each Tuesday–Saturday at 7 a.m. (approximately).
 - Agency-based benefits coordinators, employees or ERS staff may enter benefits elections or changes to ERS.
 - The CAPPs ERS Inbound screen displays tabs where the agency Superuser can view the data that was loaded, and check for any errors.
 - The ERS Inbound landing page has several **tabs** containing different types of data:
 - **Overall Results** tab — contains a summary of the daily ERS file load. Select the **Get most recent Daily Load** checkbox to see the most recent file.
 - **A Records** tab — contains employee's personal data (such as ABBR, name, address and date of birth).
 - **AC Records** tab — contains the benefits enrollment data for the employee's elections sent by ERS.
 - ◇ Benefits plan data (such as benefits plan type, enrollment effective date, the coverage level and the employee's selection of elect or waive) are loaded on this tab.
 - ◇ Errors recorded on the **AC Records** tab correspond to an error message number. The message number can be referenced in the **Message Catalog** tab to determine the source of the error.
 - **Pay Hlth Contrb Recs** tab — receives data as a part of the ERS benefits load.
 - **FA Records** tab (or **Financial Adjustment** tab) — captures deduction adjustments, which may need corrections.
- When reviewing ERS Daily inbound files, keep in mind the following:
 - Agency benefits coordinators should review the ERS Inbound file daily for errors and to ensure employee benefits changes or new hire enrollments were loaded.
 - Enter the new hire record in CAPPs before enrolling the employee's benefits elections in ERS. The employee must have a CAPPs employee record for the benefits enrollment data to match.
 - If employee benefits enrollments were not loaded correctly, agency benefits coordinators may need to manually enroll employee benefits elections.
 - The *ERS Daily File Processing Desk Aid* contains steps and images to help agency benefits coordinators understand how to manually enroll employee ERS benefits elections in the CAPPs benefits module.
 - Verify benefits effective dates and specific plan coverage levels in ERS before processing manual benefits enrollments in CAPPs.
 - Changing benefits enrollments in the CAPPs benefits module without first enrolling or correcting employee benefits in ERS will not correct the issue.
 - ERS is the employee benefits system of record. Agency benefits coordinators should start with ERS to verify benefits and plan elections and coverage dates before making changes in CAPPs.
- Contact the CAPPs Help Desk or open a Support Request ticket in the CAPPs Central HR/Payroll ASP ticketing system with questions or for assistance.

VII. Open Forum/Q&A

Several questions were highlighted from the pre-meeting survey form.

- **Question:** *On the first screen of the manage position function there is an “available for telework” field. Is that field now obsolete? If so, could that be repurposed to identify a position, versus a person, that is fully remote to create a historical reference in CAPPS?*
 - **Answer:** Yes. An agency may use this flag to identify positions that are eligible to be remote workers. There is no connection to the remote worker functionality, but it can be used as the agency needs. If the agency decides to use this flag (at FY), please let CAPPS support team know so we can make sure it’s carried forward to the 9/1/## row.
- **Question:** *Can data from the remote worker report be added to the active employee listing? This would allow HR to provide Admin/ SSO/ executive assistants with additional data to identify whether employees of concern are hybrid or fully remote without producing additional reports.*
 - **Answer:** You can submit a request for an update to the active employee report in CAPPS HD in order to add this information. Remember, it needs to be voted on by the UG before development can begin.
- **Question:** *Can additional information be included on the remote worker report to include a location code, department name, and state descr (state jobcode)?*
 - **Answer:** We should be able to add additional fields to the *Insights*. Remember, any additions to this report need to go through UG voting before we can add them to the *Insights*.
- **Question:** *When ePM Fluid was rolled out, there was a known bug that prevented managers from editing/updating pre-populated or pre-defined content items within the performance document. When can we expect a solution to this bug?*
 - **Answer:** We are still waiting for Oracle's solution for a permanent fix, but we are working directly with the agencies to re-configure the templates by removing any generic content items. If you need assistance, please open an SR and we'll be happy to do the configuration.

VIII. Deep Dives

Several modifications were made to the **Time and Labor** module with the Image and Tools upgrade that went live in June.

- Three major changes were made to the timesheet:
 - Moved the plus (+) and minus (-) buttons (used to add and delete rows) to the left-hand side of the page.
 - Added freeze functionality that allows the time reporting codes (TRCs) and plus (+) and minus (-) buttons to remain visible when scrolling to the right. A freeze line sits between the minus (-) button and the first timecode entry box.
 - Added a **View By** option that allows the time reporter to enter and display time by a single FLSA week or by month.
 - Made the timesheet view **default** to the beginning of the employee’s FLSA Workweek regardless of the date selected on the calendar.
 - TRC and FLSA workweek changes require the timesheet view to be changed to monthly. Previously, as a workaround, we suggested pulling up the timesheet as of the effective date of the change. However, that is no longer an option.
- In **Time Management**, the *Reported Hours* remain at zero unless there is a deviation from the employee’s assigned schedule.

NOTE: Leave Without Pay (LWOP) and FLEXS do **not** show up under **Reported Hours** on the timesheet.

IX. Wrap-up/Close Meeting

- **Next Meeting:** Thursday, August 22, 2024 —HR/Payroll and Financials (Combined) User Group Meeting
- Invitations for the August **CAPPS Service Desk** training will be sent to all Level 1s and IAM/TDIS DAs this week.
- 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