

CAPPS HR/Payroll User Group Meeting

Tuesday, Sept. 24, 2024

9–10:30 a.m.

(Webinar Only)

I. Announcements and Reminders

- Several Post-fiscal year-end activities are still ongoing. Submit questions or requests for assistance in your agency fiscal year-end service request (SR) ticket.
 - Check your fiscal year-end SRs to resolve any Texas Employee Retirement System (ERS) errors.
 - The *annual to sick leave conversion* and *sick/family leave pool* processes are **due Sept. 30, 2024**.
 - Run your *military leave balance carry forward* **after Sept. 30, 2024**.
 - Visit [CAPPS Training](#) to view or download the new fiscal year-end desk aids.
- Agencies must certify emergency leave using the **Emergency Leave Reporting** web application by **Tuesday, Oct. 1, 2024**.
 - CAPPS production support loaded emergency leave information to the **Emergency Leave Reporting** web application **on Sept. 21, 2024**. Any fiscal 2024 leave certifications that were completed before Sept. 21, 2024 were purged and need to be re-entered.
 - Certification is still required for agencies do not have any employees that were granted more than 32 hours of emergency leave.
 - If timesheet corrections are necessary **between certification and Oct. 1, 2024**, open an SR to backtrack the certification and reload the leave data to the web app. CAPPS production support will reload the **Emergency Leave Reporting** web application for recertification.
 - If a mainframe password reset is necessary, contact the CPA Help Desk at 512-463-4357.
- Employees can pledge donations to the State Employee Charitable Campaign (SECC) **Sept. 1–Oct. 31, 2024**. Agencies should:
 - Review/reject elections.
 - Research/address SECC file errors.
 - Visit [CAPPS Training](#) to view or download the year-end close *SECC Process for Agency Payroll Administrators* desk aid.
- In some cases, users who serve as both Level 1 support and delegated administrator (dual agents) might submit the wrong SR ticket type (**Incident** instead of **Password Assistance**). ALL dual agents have the *Password Assistance* SR catalog item in their HR/Payroll CAPPS Service Desk.
 - Dual agents who do not have access to the *Password Assistance* option should contact their agency security coordinator to submit a new dual agent request in the *Statewide Fiscal Systems (SFS) Security Request* form.
 - Questions about this process can be sent to [CAPPS Governance](#).
- CPA's Fiscal Management (FM) division is conducting a *Customer Service Survey* through **Friday, Oct. 4**.
 - The survey has three main questions that should take less than a minute to answer.
 - The survey is an opportunity to provide feedback about FM's teams and statewide systems.
 - Take the [FM Customer Service Survey](#).

II. Production Updates

- The HR/Payroll SR data for August 2024 included 959 new tickets opened and 859 tickets closed. There were 596 tickets carried forward from August into September. These numbers represent a significant increase over July, attributed to the agency fiscal year-end SRs as well as the transition to the CAPPS Help Desk system.
- The HR/Payroll release for September contains 15 requests consisting of eight break-fixes, five improvements and two new features. Highlights include:
 - **SR-60341/55324** – A break-fix to correct paycheck insurance deductions in cases where ERS has processed an *Administrative Exception Request (AER)*, resulting in two effective dated rows sent in the same daily file. The *Annual Base Benefit Rate (ABBR)* information now populates on the employee's **Job** row.
 - **SR-60255/53626** – An improvement to transmit updated job posting end dates to the WorkInTexas (WIT) posting interface in order for job posting details to match between the CAPPS Career section and WIT. CAPPS Recruit users no longer need to use a workaround of making an edit elsewhere on the requisition in order to send the posting end date update to WIT.
 - **SR-60045/31037** – A new feature to create a new query, `TX_HR_AGY_TREE_DETAILS` so that core Human Resources and CAPPS Recruit users can see the department details in the tree manager and they can validate/manage agency department changes effectively.

- The HR/Payroll releases for October include 14 new requests across two release dates. Release one contains three break-fixes, six improvements and one new feature. The user acceptance testig (UAT) for release 1 occurs Sept. 23-27, with deployment scheduled for Oct. 10. Release 2 contains three break-fixes and one improvement. UAT for release two occurs Oct. 14-18, with deployment scheduled for Oct. 24. Highlights are:
 - **SR-60367** – A break-fix to move the *Return to Leave Balances* hyperlink on the *Leave Balance* details page from the middle of the employee’s header information to below the header. This change affects managers, time administrators and time and labor superusers.
 - **SR-60157** – An improvement to the *PreCalc Audit* report to prevent bogus errors when a mid-pay period job data change or termination occurs and the report reflects accurate results.
 - **SR-60423** – A break-fix for the information contained on the *Position and Reporting Details* section of the *Mange Position* page so it accurately display values based on the position’s effective date and/or effective sequence date row — this results in core position control users being able to see the changes in values from one row to the next when they use the **next** and **previous** buttons.
- For the new functionality being implemented in the August releases, three changes are highlighted for agency testing during UAT. The functionality and acceptance criteria:
 - **SR-60214** – A request to prevent a user from making position changes for the position that they occupy.
 - **Acceptance Criteria:** Validate that you receive a hard edit and cannot move forward due to an error message when:
 - ◇ Changing the location for a position where the user is the incumbent.
 - ◇ Adding a new row to change the jobcode for a position where the user is the incumbent.
 - ◇ Changing the location on a position where the user is a contingent worker **and** an incumbent in the position.
 - ◇ Deleting a row on the position where the user is the incumbent.
 - Validate that the position will save (and can be retrieved after the save) when you update the position where the user is **not** the incumbent.
 - **SR-60367** – A request to correct the positioning of the *Return to Leave Balances* hyperlink on the employee header on the *Leave Balance* details page.
 - **Acceptance Criteria:** This work unit moves the *Return to Leave Balances* hyperlink on the *Leave Balances* details page out of the middle of the employee header information and places it below the header. This was not an issue with the employee dashboard. Superusers, time administrators and managers should validate that the hyperlink is below the header details when reviewing an employee’s *Leave Plan* on the *Leave Balances* page (from the user dashboard, *Leave Balances* menu).
 - **SR-60441** – A request to display the *Employee/Employer (EE/ER) Tax Difference* in the correct columns in the *EE/ER Tax Difference* report.
 - **Acceptance Criteria:** Payroll Processors can run the *EE/ER Tax Difference* report during on/off cycle payrolls, which accounts for payments when the employer OASDI/Medicare taxable gross/tax amounts are different from the employee OASDI/Medicare taxable gross/tax amounts.
- Two enhancements were submitted for a vote to be added to the CAPPS HR/Payroll baseline:
 - **SR-61316 (ASP SR 55614)** – Add `USERID` to the PEI file for daily updates.
 - **User Story:** *As a Core Human Resources user, I want to include the UserID value along with the EmplID on the person table in the Personnel Extract Interface (PEI) file so that I can analyze the data more efficiently on the PEI daily extracts.*
 - **Proposed Solution Summary:** This requirement is to add the `USERID` field to the person table on the PEI file.
 - **SR-61651 (ASP SR 50179)** – CAPPS ePM Query - Update The Date Prompt Search Criteria.
 - **User Story:** *As an ePM administrator, I want to run the employee evaluations with a sub-item ratings query, to view documents within a given date range that contain sub-item ratings, so I can accurately monitor the consistency of our evaluations.*
 - **Proposed Solution Summary:** On the query `TX_EP_AGY_EVAL_SUBITEM_RATING`, update the prompt titles to *Search Start Date* and *Search End Date*, update the search criteria for the date range prompts searching only the document’s `PERIOD BEGIN DATE` field and then search between the dates entered.

III. On the Horizon

- The *Equal Employment Opportunity (EEO) Report* (mandated by Texas Labor Code, Section 21.552) compiles statistical information about minority hiring practices for employees of state agencies and institutions of higher education for the previous fiscal year (Sept. 1–Aug. 31). The detail reports list each employee by SSN, name, EEO Job Code, race and sex. The workforce section lists every employee who has worked for the agency during the fiscal year, including terminated employees. The new hire section lists every employee hired at the agency during the fiscal year.
 - See the [2024 Equal Employment Opportunity Report \(FPP F.016\)](#) for additional information, including report correction instructions, a legend of codes, selection criteria and the EEO detail file format. On Oct. 17, 2024, the acknowledgment form (link) will be available in the right-hand column menu, under the **Form** heading in the right-hand menu.
 - Agencies and institutions of higher education must:
 - Review the preliminary report to verify that the information reported in each category is correct.
 - Reconcile the report and make corrections accordingly if discrepancies are found.
 - Make corrections by the deadline (corrections made after the deadline are not reflected in the final report).
 - Acknowledge receipt of the preliminary report.
 - Submit the acknowledgment form (electronically) to the Comptroller’s office on or before the applicable deadline (listed in FPP F.016, in the right-hand column menu, under the **Calendar** heading):
 - ◇ **Oct. 17, 2024: Preliminary 2024 EEO Report Available**
Agencies and institutions receive the preliminary report (for the Sept. 1, 2023–Aug. 31, 2024 reporting period) via electronic file transfer (EFT) and are allowed time to review the data and enter/submit changes before the final report is sent to Texas Workforce Commission (TWC).
 - ◇ **Oct. 24, 2024: EEO Report Acknowledgment Form Due**
The *EEO Report Acknowledgment* ensures that all agencies and institutions have received the preliminary report and have had the opportunity to make changes, as necessary.
 - ◇ **Oct. 29, 2024: EEO Report Data Corrections Due**
All corrections for the report period must be completed by 4:30 p.m. on Oct. 29, 2024. Corrections should be made in CAPPs, which are then sent to SPRS via automated batch processing.
 - ◇ **Oct. 31, 2024: Final EEO Report Available**
Final copies of the *2024 Equal Employment Opportunity Report* are sent via EFT to each agency and institution. The final report reflects all maintenance or corrections entered or submitted to SPRS (including CAPPs data). The Comptroller’s office sends the final reports to TWC’s Civil Rights Division.
- As calendar year-end approaches, agencies are encouraged to promote the electronic consent (eConsent) options for all their year-end forms.
 - To encourage users to use the eConsent options, we will be sending out a toolkit in October that includes an eConsent desk aid and campaign flyer. In addition, we will send a template/sample campaign email that agencies can customize and send to staff.
 - The *TX Year-End Consent Status Report* query displays W-2 and 1095-C consent statuses — so each agency may collectively view consent status for its agency’s active employees across all calendar year-end functions. To run the report:
 - Navigate to the Query Viewer. From the NavBar:
 - ◇ Select **Menu**.
 - ◇ Select **HR/Payroll Reporting**.
 - ◇ Select **Query**.
 - ◇ Select **Query Viewer**.
 - Search for the query by entering the whole query name (TX_YEAR_END_CONSENT_REPORT) or the beginning of the query name, then select **Search**.
 - Locate the query in the results.
 - Select the output type (HTML, Excel or XML).
 - In the prompt, enter your agency number into the `COMPANY` field and select **View Results**.
 - As of Sept. 2024, across all CAPPs agencies, 62 percent of employees have consented to electronic delivery of their W-2 and 58 percent have consented to electronic delivery of their 1095-C.
 - Plan your communications strategy now and utilize the toolkit to increase your e-delivery rate.

IV. Features & Spotlights

- An edit in **Manage Job** (intended to prevent deletion of the fiscal 2025 row) caused unintended behavior that prevented changes to any later rows.
 - The edit has been changed to accommodate the request from agencies to make changes to the fiscal year row and any **Manage Job** entries on or after the 09/01 fiscal year row.
 - The CAPPs team will monitor any deletions of fiscal year rows and will contact the agency, if necessary.
- Heavy volumes of entries on the *Manage Position* page cause a sync issue in the supporting tables' backend.
 - Data is now automatically syncing every hour to avoid any issues.
 - The CAPPs team is working on a permanent solution for this issue. **(SR-60517)**.

V. Open Forum/Q&A

Several Deep-Dive suggestions were submitted to the pre-meeting survey form. These suggestions are being considered for development for upcoming User Group meetings. In addition to those suggestions, two questions are highlighted:

- *Would you consider putting more fields on the Texas Compensation History, like current location, current PN and current manager?*
 - **Answer:** Yes. The *Texas Compensation History* page allows a user to enter a FROM and THRU date and displays a list of compensation-related transactions in **Job**.
If there are additional fields that would be helpful to your business process, open a *Suggest an Enhancement* ticket in the CAPPs HR/Payroll Service Desk system. Let us know what additional fields you would like us to consider adding to this page and provide us with some additional information, such as how your agency uses this page and why this information is beneficial to your business process. If the suggestion is a good fit, we will move forward with the enhancement request or we may recommend other solutions that might be a better fit to assist with your business needs.
- *There is not enough information on the watched tickets dashboard of the new ticketing system. Could the Extended status and date/time the ticket was last updated be added? These fields will greatly assist when determining which tickets may be ready for testing or FDD review. The date/time last updated is helpful if a comment was added to the ticket since the last time it was viewed since watchers don't receive notification for tickets, as we did the ASP system.*
 - **Answer:** Our team does not have a way to configure the watcher view/dashboard but we agree that adding these features would be of great use for everyone — so we have submitted an enhancement request to BossDesk and will keep users updated with any solutions.

VI. Wrap-up/Close Meeting

- **Next meeting:** Thursday, Oct.24, 2024 — HR/Payroll and Financials (Combined) User Group Meeting
- 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