CAPPS HR/Payroll User Group Meeting

Tuesday, April 29, 2025
9–10:30 a.m.
(Webinar Only)

I. Announcements and Reminders

- The Reporting environments RPT1 and RPT2 will be decommissioned on May 29, 2025.
  - User Acceptance Testing (UAT) for the new Production queries is May 12–23, 2025 (in the UAT1 environment).
  - All queries and reports currently run in the production Reporting environment (RPT1) will be run directly in CAPPS Production effective May 30, 2025.

    > **Note:** Following the user group meeting, the details of the timeline and access changes were revised. The summary below represents the updated information.

  - To prepare, please take note of the following required steps to prevent the loss of query capabilities that could result from these changes.
    - **Step 1**: The current non-production Reporting environment (RPT2) will be decommissioned on Thursday, May 8, 2025, at 5 p.m. All existing security access for RPT2 will be transitioned to UAT1 and UAT3 so agencies will have the opportunity to participate in UAT.
      - Agencies have May 12–23, 2025, to complete all UAT. Testing should include private queries, public queries, and CAPPS BI Publisher Reports.
      - To accomplish Step 1, all agency users will be locked out of UAT1 and UAT3 beginning Thursday, May 8, 2025, at 5 p.m. All access will be restored no later than Friday, May 9, 2025, at 7 a.m.
    - **Step 2:** The current production Reporting environment (RPT1) will be decommissioned on Thursday, May 29, 2025, at 7 p.m.
      - To accomplish Step 2, **<u>all agency users will be locked out of CAPPS Production</u>** beginning Thursday, May 29, 2025, at 7 p.m.
      - All access will be restored to CAPPS Production no later than Friday, May 30, 2025, at 7 a.m.
    - **Step 3:** The decommissioning of the existing reporting environments (RPT1 and RPT2) requires that all existing security access to those environments be removed. That occurs on Thursday, May 29, 2025, at 7 p.m. **<u>Agencies will lose their ability to run queries, unless and until Step 4 is completed.</u>**
    - **Step 4:** Agency Security Coordinators (ASC) **must submit** new requests by May 21, 2025, for any users who need to continue to have access to either Query Viewer or Query Manager in CAPPS Production after May 29, 2025. ASCs should follow the standard security request process for requesting access.
      - Users should not make changes to private queries in RPT1 on Thursday, May 29, 2025.
      - Any changes made on May 29, 2025, will be lost during the transition to CAPPS Production.
- PeopleTools upgrade from version 8.60.10 to version 8.61.07 occurs on Aug. 4, 2025.
  - UAT is April 7–July 18, 2025 (use UAT3 environment).
  - Report issues in CSD as an **Upgrade & Expansion Project Assistance** Service Request.
- The biennial 2025 Letter of Authorization (LOA) signature recertifications are due by May 31, 2025.
  - Beginning June 1, 2025, only newly authorized state employees may request data changes.
  - Authorization documents must be mailed in.
  - For any questions, please refer to your agency SR ticket.

II. CAPPS HR/Payroll Production Updates

- The HR/Payroll SR Data for March 2025 included 731 new tickets opened and 852 tickets closed. There were 644 tickets carried forward from March into April.
- The HR/Payroll release for April contains 11 requests consisting of five break-fixes, five improvements and one new feature. Highlights include:
  - **SR-62051** – A break-fix that resolves an issue with the ERS File Contribution process. It now successfully executes in circumstances when a document was reprocessed.
  - **SR-63232** – A break-fix to the *TX_HR_AGY_ACTVPOS_WEE_INFO* query. It now accurately displays the `DATE POSITION LAST OCCUPIED` for empty positions in cases where the last employee who occupied the position transferred to a new position opposed to just terminating from the agency.

    - **SR-61294** – A feature to add DENIAL REASON to the new FMLA Event Status Report.
    - **SR-63707** – An enhancement for Position Management (ePM) where managers are now able to update pre-populated and pre-defined content items on an employee's performance document.
- The HR/Payroll release for May contains 11 requests consisting of six break-fixes, five improvements and zero new features.
- For the new HR/Payroll functionality being implemented in the April releases, four changes are highlighted for agency testing during UAT. The functionality and acceptance criteria are:
    - **SR-60010**
        - **User Story**: *As a Core Human Resources (HR) user, I want to receive a fatal error when trying to enter a full month of Leave of Absence (LOA) in Job Data for my dual or concurrent employee, so that I can review and accurately manage any full months of LOA in Time and Labor.*
        - **UAT**: April 28–May 2. Testers should validate that an LOA cannot be keyed in Manage Job for a dually-employed employee who resides in a service-eligible job code with both agencies.
        - **Migration to Production**: May 8.
    - **SR-66783**
        - **User Story**: *As a core Human Resources (HR) user or CAPPS Recruit hiring manager, I want CAPPS to error if I attempt to save a new hire where "unknown" exists for the gender, so that I can ensure the new employee is correctly identified as either male or female.*
        - **UAT**: May 12–16. Testers should validate that an error is received on the CAPPS Custom Hire component in cases where the gender selected is not male or female.
        - **Migration to Production:** May 22.
    - **SR-65404**
        - **User Story**: *As a payroll processor, I want the Texas Qtr UI Wage/TXTax 810 Report to be updated so that the report displays one active record per employee, regardless of the number of employment records the employee has for the agency, since balances are maintained at the employee level.*
        - **UAT**: April 28–May 2. Validate that the payroll processor can run the *Texas Qtr UI Wage/TXTax810* report every quarter and displays one active record per employee (regardless of the number of employee records) while also including total wages for each employee.
        - **Migration to Production**: May 8.
    - **SR-66575**
        - **User Story**: *As a Time and Labor (TL) super user and TL time administrator, I want to add the From and To date criteria prompts to the TX_TL_AUDIT_REPORTED_TIME query so that large data sets that are over the set maximum limit can be restricted to a specific data set.*
        - **UAT**: May 12–16. Testers should verify that the FROM DATE & TO DATE fields display as prompts on the query.
        - **Migration to Production**: May 22.
- Two HR/Payroll enhancements are submitted for a vote to be added to the CAPPS HR/Payroll baseline. The SRs and their titles from CSD (along with the user stories and proposed solution summaries) are listed below. For complete details, please review the SRs within CSD. Agencies are encouraged to add comments to these SRs for consideration by the CAPPS Steering Committee following their next scheduled meeting on May 13.
    - **SR-67622** – Manage Position (Include History) – Add **Next**/**Previous** buttons enhancement (suggested via **ENH-61378**)
        - **User Story**: *As a CAPPS User, I want to be able to use the Next and Previous buttons to scroll through position information on the View Position page, so that I can look through all effective dated rows for a position without having to return to the search page and select each row individually.*
        - **Proposed Solution Summary**: New PeopleCode will be added to the page to enable users with a "view only" role to Manage Position to toggle the Next and Previous buttons. This allows the user to scroll through all rows for a particular position without having to return to the search page and select one at a time.
    - **SR-67624** – Add Agency Service Date and Latest Agency Hire/Rehire Date to ESS enhancement (suggested via **ENH-67364**)
        - **User Story**: *As an Employee, I want to be able to view my agency service date and most recent hire/rehire date in Employee Self-Service(ESS), so that I can easily access this information whenever I need it.*
        - **Proposed Solution Summary**: Both the AGENCY SERVICE DATE and the most recent HIRE/REHIRE DATE for an employee will be added to the ESS *Additional Information* page, which is located on the *My Profile* tile.

III. Open Forum Q&A

- We received no questions from the input survey for April.
- Each month, we release a survey where user group members may submit questions or suggestions for discussion topics. Members can find the survey link in the calendar invitation for the meeting as well as on FMX's CAPPS user group pages. We encourage all members to submit questions and suggestions.

IV. Deep Dives

We are beginning a series about the steps and best practices of the Employee Life Cycle. The first segment is the HR module with Position Management.

- When an agency identifies the need to fill a new role and hire a new employee, the agency's super user either creates a new position or updates an existing one. To create a position, follow these steps:
  Navigation Path:

  Dashboard: Workforce Administration; **Tile:** Manage Human Resources; Manage Position.
  –or–
  NavBar: Organizational Development; Position Management; Manage Position.

  1. Select **+ Add New** to add a new position.
  2. Enter the `EFFECTIVE DATE` the position needs to be active with your agency, then select **Add**.
  3. The *Position Data* page displays. Enter the position information such as `JOB CODE`, `REGULAR OR TEMPORARY` indicator, `FULL TIME/PART TIME` indicator, `DEPARTMENT ID` assignment, `LOCATION`, `REPORTS-TO` assignment and `STANDARD HOURS`.
  4. Select **Next**.
     The *Additional Information* page displays.
  5. If this position will add to your agency's FTE count, change the `ADDS TO FTE ACTUAL COUNT` indicator to **Yes**.
  6. Enter the FTE numerical value in the `FTE` field. For example, if the position is scheduled for 40 hours, **1.0** is the FTE equivalent. If the position is scheduled 20 hours, **.5** is the FTE equivalent.
  7. Select **Next**.
     The *Budget Incumbents* page displays.
  8. It is recommended to adjust the `UPDATE INCUMBENTS` indicator to **Yes** to allow transactions to flow from Manage Position to employee data on Manage Job.
  9. Select **Next**.
     The *Position and Reporting details* page displays.
  10. Update the *Position Report Detail* section, as needed. These are available for agency use but are not required fields to create a new position.
  11. Select **Next**.
      The *Review and Submit* page displays.
  12. If any data is incorrect, select the **Previous** button to return to a previous page and correct the data. Once all the data on the review page is correct, select **Submit**.
      The *Position Confirmation* displays. At this point, the position number is created and is noted in the banner and the header at the top left side of the page.
  13. Select **Go to Position Details** to review the position page for the newly created position and make a note of the new position number.
- **Best Practice:** Review the position data for new positions for accuracy before utilizing the position to onboard a new hire to prevent the need for corrections to CAPPS' new hire records. Correcting position and employee records after a new hire has been onboarded may require corrections in several modules and may require a Letter of Authorization (LOA) for CAPPS Agency Service to process corrections.
- The preferred framework is one position number to one employee. Contingent workers, who are not paid through CAPPS, may share a non-employee position number.
- Effective dates and sequence of data rows in Manage Position will affect how CAPPS updates and maintains matching incumbent and position data.
- Contact the CAPPS service desk for any assistance with the Position Management module.

V. Wrap-up/Close Meeting

- **Next meeting:** Thursday, May 29, 2025 —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