

CAPPS HR/Payroll User Group Meeting

Tuesday, July 29, 2025

9–10:30 a.m.

(Webinar Only)

I. Announcements and Reminders

- CPA Executive and Fiscal Management staff updates, effective July 1.
 - Agency Update:
 - Former Comptroller Glenn Hegar is the new Chancellor of The Texas A&M University System.
 - Acting Comptroller Kelly Hancock was sworn in to complete Mr. Hegar's term.
 - Fiscal Management Division Update:
 - Rob Coleman was promoted to associate deputy comptroller for Operations and Support.
 - Clarisse Roquemore was promoted to director of Fiscal Management.
 - Chelsa Vinklarek was promoted to assistant director of Fiscal Management.
- Symantec Protection Engine (SPE) went live on July 21 in the production environments.
 - Used to detect malware, viruses and other threats across CAPPS.
 - Disallows .exe and .zip files that are password-protected or encrypted.
 - Allows standard .zip files.
- Agencies with 100 or more positions or budget changes may request a *Budget Load* spreadsheet or *Mass Reorganization* spreadsheet via their fiscal year-end (FYE) service request (SR) ticket in CAPPS Service Desk (CSD). Due dates for submitting test and final sheets to CAPPS:
 - **Aug. 1, 2025** — **Test Mass Reorganization** spreadsheets are due by 5 p.m.
 - **Aug. 8, 2025** — **Test Budget Load** spreadsheets (BLSs) are due by 5 p.m.
 - **Aug. 15, 2025** — **Final Mass Reorganization** spreadsheets are due by 5 p.m.
 - **Aug. 22, 2025** — **Final BLSs** are due by 5 p.m.
- FYE system schedule:
 - Normal processing is available until **Friday, Aug. 29, at 5 p.m.**
 - All transactions processed on Aug. 29 are sent to SPRS before the CAPPS team begins the FYE process.
 - The system will be unavailable **Aug. 29 at 5 p.m. – Sept. 2 at 8 a.m.**
 - Normal CAPPS activities will resume on **Sept. 2 at 8 a.m.**
- The CAPPS STARR project began in July 2025 with an anticipated launch on Sept. 1, 2027.
 - The Comptroller's office signed a contract on June 30 to begin the CAPPS State of Texas Accounting and Reporting Resource (STARR) project, which will modernize the state's critical financial functionality by replacing the USAS, TINS and SPA legacy systems with a cloud-based solution.
 - The new CAPPS STARR system will include core USAS/TINS/SPA functions used by the Comptroller's Fiscal Management staff and by all state agencies and institutions of higher education.
 - Contact statewide.accounting@cpa.texas.gov with any questions.

II. CAPPS HR/Payroll Production Updates

- The HR/Payroll SR Data for June 2025 included 830 new tickets opened and 790 tickets closed. There were 582 tickets carried forward from June into July.
 - There was a minor increase in new tickets due to agencies requesting agency holiday setups for Independence Day.
 - Closed tickets decreased as the bulk of Letter of Authorization (LOA) Signature Recertification requests were closed during May.
 - Carry-forward counts remain in the normal range.
- The HR/Payroll release for July contains 1 request consisting of 1 break-fix, 0 improvements and 0 new features. Highlights include:
 - **SR-68715** – A break-fix that prevents an error from being generated when using the **SPRS OOB Correction** page to correct mid-pay period changes with split funding.
- The HR/Payroll release for August contains 22 requests consisting of nine break fixes, nine improvements and four new features.

- For the new HR/Payroll functionality being implemented in the August releases, three changes are highlighted for agency testing during user acceptance testing (UAT). Functionality and acceptance criteria:
 - **SR-66500**
 - **User Story:** *As a TL manager, I want the **Approve Timesheet** page to display the pending approval message only when there's time pending approval, so that managers can accurately determine there's time needing approval.*
 - **UAT:** July 28–Aug 1 in environment **UAT3**. Testers should verify the reported time for an employee with various hours under different TRCs on the same worked date or multiple work dates.
 - **Migration to Production:** Aug. 14.
 - **SR-67800**
 - **User Story:** *As a Core Human Resources (HR) user, I want the `CMPNY_SERVICE_DT` field in the `TX_EMPLOYEES_CUR` record to correctly reflect an employee's state service date, so I can utilize the data on reports for internal use by my agency.*
 - **UAT:** July 28–Aug 1 in environment **UAT3**. Testers should validate that the `CMPNY_SERVICE_DT`:
 - Found in the `TX_EMPLOYEES_CUR` record aligns with the `STATE SERVICE DATE` displayed in **Manage Job** for employees with Time and Labor leave without pay.
 - Results displayed in the following queries aligns with the `STATE SERVICE DATE` displayed in **Manage Job** for employees with Time and Labor leave without pay:
 - `TX_HR_AGY_EMPLOYEE_LISTING`
 - `TX_HR_AGY_EMPLOYEE_LISTING_PII`
 - `TX_HR_AGY_RETIREMENT_FORCAST`
 - `TX_HR_AGY_RETIRE_POTENTIAL`
 - `TX_HR_AGY_SERVICE_AWARDS`
 - **Migration to Production:** Aug. 14.
 - **SR-69207**
 - **User Story:** *As a Core Human Resources (HR) user, I want the ability to enter the 6% fiscal year salary increase for licensed attorneys, so that I can ensure statutory compliance.*
 - **UAT:** Aug. 18–22. Testers should validate:
 - Can enter and successfully save a `PAY/L40 ACTION/ACTION REASON` for an employee in an eligible job code.
 - Error is received and the transaction can not be saved in cases where a `PAY/L40 ACTION/ACTION REASON` is entered and the:
 - Employee is not in an eligible classified job code.
 - Employee is under disciplinary action.
 - New monthly compensation increase exceeds six percent.
 - New monthly compensation exceeds the salary plan maximum for the job code.
 - **Migration to Production:** Aug. 28.
- One HR/Payroll enhancement is submitted for a vote to be added to the CAPPS HR/Payroll baseline. The SR and the title from CSD (along with the user story and proposed solution summary) are listed below. For complete details, review the SR within CSD. Agencies are encouraged to add comments to the SR for consideration by the CAPPS Steering Committee following their next scheduled meeting on Aug. 12.
 - **SR-70108** – Modify `TX_HR_AGY_ONE_TIME_MERIT` to include active and inactive employees (suggested via **ENH-65487** and **ENH-67992**).
 - **User Story:** *As an HR user, I would like the `TX_HR_AGY_ONETIME_MERIT` query to include active and inactive employees for a more thorough review.*
 - **Proposed Solution Summary:** Modify the existing query to include both active and inactive employees.

III. On the Horizon

- The *Equal Employment Opportunity (EEO)-4 Report* reflects state agency hiring practices for odd-numbered years and consists of an agency detail report and an agency summary report.
- The Governor's office uses the *EEO-4 Report* to report and certify to the U.S. Equal Employment Opportunity Commission on behalf of the state of Texas as a single employer.
- Agencies receive the preliminary and final report through electronic file transfer (EFT).

- Important Dates:
 - **July 24, 2025:** Preliminary *EEO-4 Report* available.
 - **Aug. 7, 2025:** *EEO-4 Report Acknowledgement Form* due.
 - **Aug. 19, 2025:** *EEO-4 Report* data corrections due.
 - **Aug. 21, 2025:** Final *EEO-4 Report* available.
 - **Aug. 28, 2025:** *EEO-4 Final Report Certification* form to the Governor's office due.
- For additional information, see [Equal Employment Opportunity \(EEO\)-4 Report \(FPP G.003\)](#).
- Several bills passed by the 89th Legislature (effective Sept. 1, 2025) impact CAPPS HR/Payroll for fiscal 2026:
 - **House Bill 252** amends state law to permit agencies that are authorized to pay employees assigned to salary groups below A12 twice-monthly to pay other salary-schedule A employees twice monthly.
 - **HB 2513** amends Texas Government Code, Section 437.202 to establish that a 24-hour or 48-hour work shift constitutes one workday for purposes of calculating the payment amount for a paid leave of absence from duties for qualifying military service in a fiscal year.
 - **Senate Bill 1** authorizes the State Auditor's office to create new *Schedule C* job codes.
 - Section 17.15 appropriates a salary increase for licensed attorneys in certain positions.
 - Stipend amounts increase for the education level (EDL), certification level (CER) and bilingual pay (BIL). Additionally, this bill removes the restriction for eligibility, so eligible employees are able to receive more than one of these stipends, if applicable.
 - Additional salary schedule changes removes A4 and adds B37.
 - **SB 2** establishes a new agency (Agy 910) to administer the Education Savings Program.
 - **SB 5** creates the Dementia Prevention and Research Institute of Texas agency.
 - **SB 150** creates the Texas Cyber Command agency.
 - **SB 293** makes changes to judicial salaries.
 - **SB 370** establishes office of the Attorney General as a protected agency, rather than just protecting employees in certain divisions.
 - **SB 1737** provides for Law Enforcement & Custodial Officer (LECOS) participation for additional commissioned peace officers and custodial officers at the Texas Juvenile Justice Department (TJJD), the Texas Comptroller of Public Accounts and the office of the Attorney General – **CAPPS will add configuration where applicable.**
 - **SB 2361** transfers the University of Houston – Victoria to The Texas A&M University System.
 - **SB 3059** transfers oversight of the Alamo from the General Land Office (Agy 305) to the new Alamo Commission at the Texas State Preservation Board agency (Agy 809).
 - **SB 3070** abolishes the Texas Lottery Commission (Agy 362), transferring business functions to the Texas Department of Licensing and Regulation (Agy 452).
 - Several changes are associated with hazardous duty pay, line of duty pay and Schedule C job codes:
 - **HB 2467** amends state law such that commissioned law enforcement officers who are commissioned by the state fire marshal at the Texas Department of Insurance (Agy 454) are entitled to benefits that are commensurate with other law enforcement positions across the state.
 - **SB 502** amends state law such that commissioned law enforcement officers of the Health and Human Services Commission's Office of Inspector General (Agy 529) are entitled to benefits that are commensurate with other law enforcement positions across the state.
 - **SB 1171** amends state law such that commissioned law enforcement officers of TJJD's Office of Inspector General (Agy 644) are entitled to benefits that are commensurate with other law enforcement positions across the state.

IV. Features and Spotlights

- Earnings statements for periods before the June on-cycle (pay dates before 7/1/25) will contain four static fields in the TAX DATA section, regardless of whether they contain data.
- Beginning with June on-cycle payroll, the TAX DATA section dynamically displays up to seven fields, as applicable.
- The TAX DATA is also presented dynamically on pay statements generated from Employee Self Service (ESS).
- The seven fields that can be displayed dynamically are:
 - ADDITIONAL AMOUNT
 - ADDITIONAL PERCENT
 - ALLOWANCES
 - DEPENDENT AMOUNT
 - MULTIPLE JOBS OR SPOUSE WORKS
 - OTHER INCOME
 - TAX STATUS

V. Open Forum Q&A

- We received no questions from the input survey for July.
- Each month, we release an *Ask Us Anything* 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 Meeting pages. We encourage all members to submit questions and suggestions.

VI. Deep Dives

- The fourth installment in our series about best practices of the *Employee Life Cycle* focuses on **Benefits**.
- After onboarding agency new hires to CAPPS, the agency superuser enters the new employee's benefits elections in the Employees Retirement System (ERS).
 - Agencies should enter their employees' benefits elections in ERS, whether they are a new hire or a direct inter-agency transfer.
 - Employee benefits must be entered in ERS under the new employing agency for transferred employees, even if the new hire does not wish to make any changes to existing benefits elections. The new hire must be set up under the new agency in ERS.
 - After the agency benefits coordinator enters the employee's benefits elections in ERS, those elections are loaded in CAPPS through the ERS daily inbound file.
- ERS sends a daily file of changes and new enrollments for employee insurance elections. When new enrollments or changes are entered in ERS, they are transmitted to CAPPS via this daily inbound file.
- The file is loaded in CAPPS at approximately 7 a.m. Tuesday–Saturday.
- Agency-based benefits coordinators, employees or ERS staff may enter benefits elections or changes in ERS.
- Agency superusers can view and verify the data loaded from ERS on the **ERS Inbound** screen.

Navigation Path

Dashboard: Workforce Administration; **Tile:** Benefits Administration, Interface Results, ERS Inbound

Navbar: Menu, CAPPS Interfaces, Benefits, Inquire, ERS Inbound Results

- The **ERS Inbound** screen includes a tabbed interface:
 - The **Overall Results** tab contains a summary of the daily ERS file load.
 - The **A records** tab contains employee personal data (such as Annual Base Benefits Rate [ABBR], employee name, address and date of birth).
 - The **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.
 - Review this tab for errors (benefits elections may have failed to load to the CAPPS benefits module correctly).
 - In the *AC Transactions in CAPPS* section, select the **Other Info** tab to display errors.
 - Errors recorded on the **AC records** tab correspond to an error *Message #* (number). The *Message #* can be referenced in the **Message Catalog** tab to determine the source of the error.
 - The **Pay Hlth Contrb Recs** tab receives data as a part of the ERS benefits load.
 - The **F records** tab captures employee flex spending reimbursement account data.
 - The **FA records** tab (or **Financial Adjustment** tab) is not used frequently but captures deduction adjustments that may need to be made.
 - The **Message Catalog** tab contains a list of errors that may appear on the ERS inbound file load.
 - Each error message corresponds to a *Message #* for referencing the *Message #* to the error definition if you find an error on the inbound file.
- Agency benefits coordinators should review the ERS Inbound file daily for errors and 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 did not loaded correctly, agency benefits coordinators should manually enroll employee 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 verify benefits, plan elections and coverage dates in ERS before making changes in CAPPS.
- Contact the CAPPS service desk or open an SR ticket in CSD for questions or assistance.
- Complete reorganizations as part of the FYE process. Changes after 9/1/25 can cause errors due to potential effective date discrepancies in department, position, job and department budget records.
- If your agency is planning a reorganization, enter a note in your FYE SR and a CAPPS team member will provide a reorg template to your agency contact.
 - A test spreadsheet must be attached to the CSD ticket no later than Aug. 1, 2025. The CAPPS Production Support staff will complete a test load and provide the results to agencies for validation.
 - The final spreadsheet must be attached to the CSD ticket no later than Aug. 15, 2025. The CAPPS Production Support staff will attach final results to the applicable CSD ticket for agencies to validate.
- The CAPPS team completes the required FYE changes associated with Job title changes and reallocations based on legislative changes. The agency is allowed to complete salary increases with the reallocations.
 - If you would like the specific details of the job title changes and reallocations, add a note to the SR requesting this information along with the name of the agency contact person.
 - If you are planning to complete any salary increases associated with the FYE reallocation, you should enter a note with the name of the agency contact person in your FYE SR by Aug. 15, 2025. The CAPPS Team will contact your agency for further details and coordination to complete any job title-related changes during the FYE activities.
- As part of the FYE process, the CAPPS Support team updates the job code and position titles on the 9/1/25 row.
- The CAPPS team recommends that agencies **create positions** designated for **temporary assignments**.
 - The agency's business practice should not use the current position for temporary assignment — instead, create a new or existing position designated for the temporary assignment and transfer the employee to the designated position.
 - Using an existing position and changing it to a temporary assignment causes issues with repurposing an existing position.
 - The CAPPS team turns off the temporary assignment before the FY26 row is sent to SPRS.
 - The agency must attach a list to its FYE SR of employees on *Temporary Assignment* and *Disciplinary Reduction* by Aug. 15, 2025.
 - The agency performs the temporary assignment record and places it back on the FY26 row when appropriate.
- *Department Budgets* in CAPPS (created each fiscal year) distribute payroll and payroll-related expenses in CAPPS HR/Payroll.
 - *Department Budgets* are established by either:
 - Copying the fiscal 2025 budget to fiscal 2026
 - or—
 - Loading the fiscal 2026 budget via a spreadsheet
 - Review current fiscal year *Department Budgets* details for any required changes.

Note: Use the CAPPS Query TX_CA_BUDGET_SS_PC_EFFDT_PUB.

 - Establishing *Department Budgets* for any new departments is required throughout the year.
 - Establishing position-level *Department Budgets* for new positions (based on agency-defined business rules) may be required.
 - Agencies that have a *Budget Load Spreadsheet* (BLS) should plan to attach a **test BLS** to their FYE SR by **Aug. 8, 2025**, and attach the **final BLS** by **Aug. 22, 2025**.
 - Agencies with *Federal Fiscal Year Department Budget* updates that require a BLS should attach the **test BLS** as attached to your FYE SR by **Oct. 8, 2025**, and attach the **final BLS** by **Oct. 15, 2025**.
- Agency changes to the *Department* on the *Job* record **after** the commitment accounting department budgets were established can impact the funding distribution and may invalidate the *Department Budget* record.
- New fiscal 2026 payroll-related Chartfields added to USAS or CAPPS Financials must be configured in CAPPS HR/Payroll.
- Validation of combination codes will be completed in late August 2025, during the FYE payroll testing.

- Effective dates are critical to sync the various CAPPS tables.
 - Position effective dates cannot be later than the `POSITION HIRE DATE` of the employee or before the `DEPARTMENT CREATION DATE`.
 - Department budget for a new department and/or position should mirror the department's or the position's effective date.
- The agency's position management and commitment accounting teams review the data from the *Position Funding* report to ensure department budgets at the position level are in the correct departments.

Navigation Path

Dashboard: Workforce Administration; **Tile:** Reports, Position Reports, Position Funding Report

Navbar: Menu, Payroll Distribution, Payroll/Commitment Acctg/Funding Reports, Position Reports, Position Funding Report

- The agency's position management team should review the out-of-sync conditions between `JOB` and `POSITION` using the *Audit – Position Exceptions* report.
- Clear all position exceptions by **5 p.m. on Aug. 29, 2025**, ahead of FYE process.

Navigation Path

Dashboard: Workforce Administration; **Tile:** Reports, Position Reports, Audit – Position Exceptions

- Enter all *terminations* and *retirements* in CAPPS HR/Payroll **by 5 pm on Aug. 29, 2025**.

Note: If the employee's last day of employment is 8/31/25, the `EFFECTIVE DATE` will be 9/1/25.

- Do not enter any September hires in CAPPS HR/Payroll until after the FYE rollover is complete on Sept. 2, 2025.
- Enter all position updates effective in fiscal 2026 in CAPPS HR/Payroll **by 5 pm on Aug. 29, 2025**.
- Clear all `POSITION EXCEPTIONS` – use the *Audit-Position Exception* report.
- Do not enter September position updates in CAPPS HR/Payroll until after the FYE rollover is complete.
- Do not enter future-dated actions in `POSITION` or `JOB DATA`.
- Remind employees to enter any leave transactions ahead of T&L FYE activities so that balances are up-to-date and accurate.
- Remind employees of the CAPPS system maintenance window: **Aug. 29, 2025, at 5 p.m. – Sept. 2, 2025, at 8 a.m.**
- Refer to the [2025 Master Schedule of Fiscal Year-End Close Events](#).
- See [CAPPS HR/Payroll Year-End Processing Instructions \(FPP T.003\)](#) for CAPPS-specific details.

VII. Wrap-up/Close Meeting

- **Next meeting:** Thursday, Aug. 21, 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