

CAPPS HR/PAYROLL End-User Training (EUT)

Employee Self Service

Course Number: 100

Course Name: Employee Self Service (ESS)

This training course does NOT include audio.



Centralized Accounting and Payroll/Personnel System

This course is recommended for all users.

Hello,

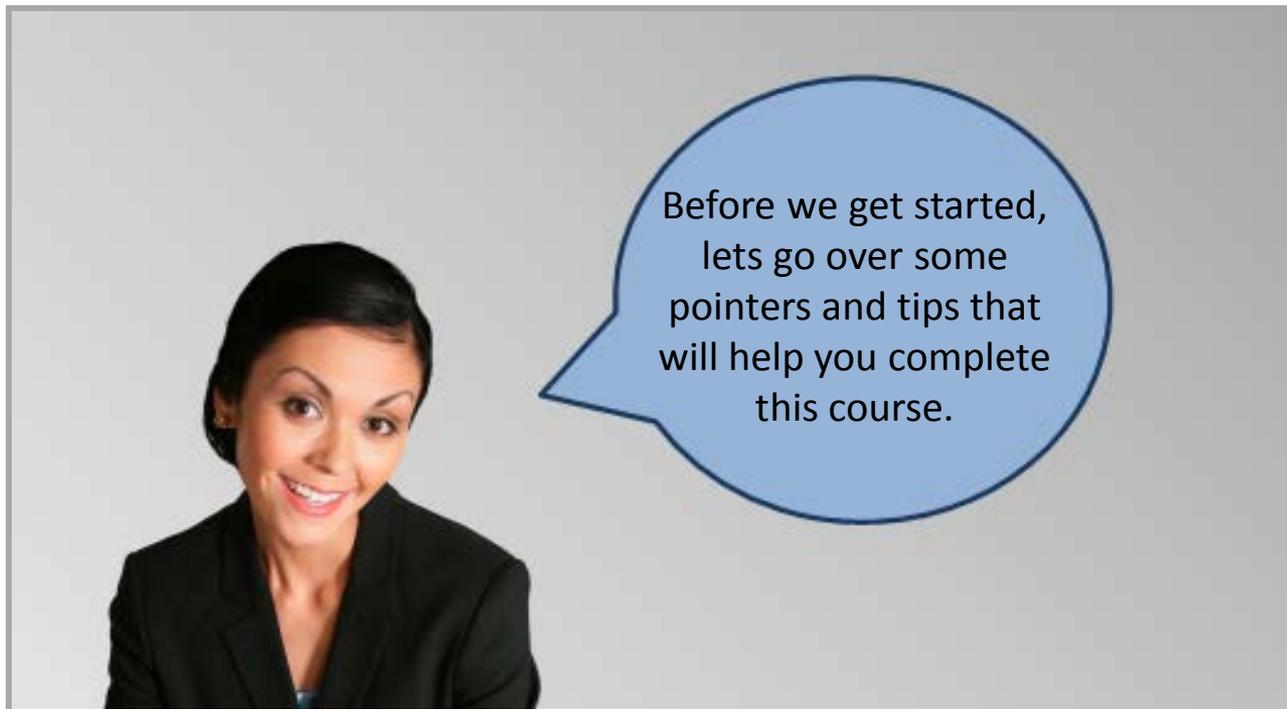
Welcome back to the CAPPS
HR/Payroll training.

Before taking this class you should have
already completed the CAPPS
Fundamentals course.





Remember me? My name is Lisa and just like I guided you through the CAPPS Fundamentals training course, I am here to guide you through your Employee Self Service training.



Pointers and tips to remember while taking this course:

A simple line-art icon of a clock face with hands, enclosed in a white square with rounded corners.

This course will take approximately 3 1/2 hours. This course may be completed in sections, or all in one session.

A yellow rectangular button with the word "BACK" in black capital letters, with a white hand cursor pointing at it, all within a white square with rounded corners.

Make sure you view all the information using the **Next** and **Back** navigation buttons.

An icon of a laptop computer with a pen resting on it, enclosed in a white square with rounded corners.

Close all other applications including email while taking the course.

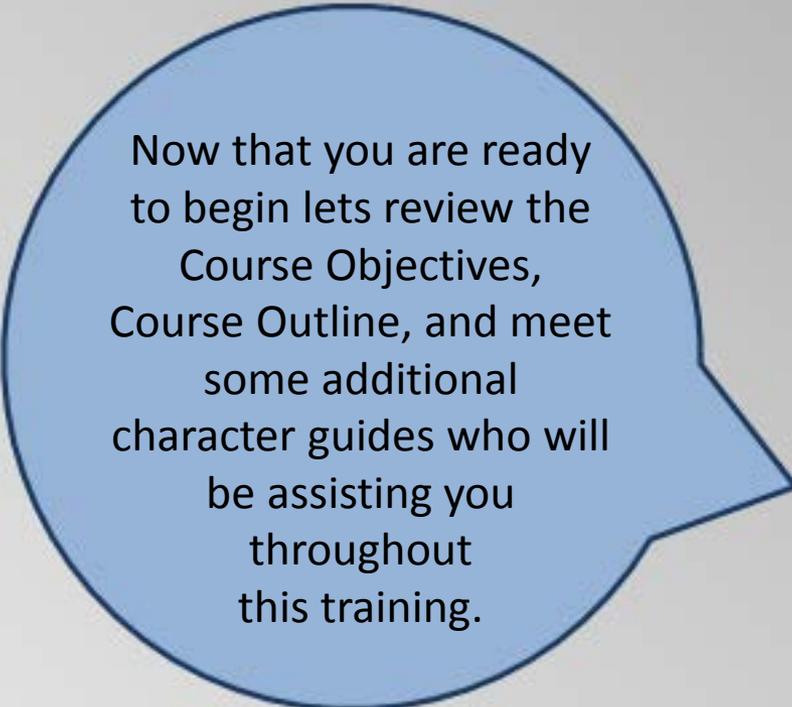
A red circular icon with a white exclamation mark inside, enclosed in a white square with rounded corners.

Move your mouse over this symbol to view content “Fun Facts”.

An icon of a red graduation cap with a tassel, resting on a stack of books, enclosed in a white square with rounded corners.

After successfully completing the course, there will be instructions on how to complete an assessment.



A light blue speech bubble with a dark blue outline, pointing towards the right. It contains text about reviewing course objectives and meeting character guides.

Now that you are ready to begin lets review the Course Objectives, Course Outline, and meet some additional character guides who will be assisting you throughout this training.



After completing this course you will be able to:

- View and edit your personal profile
- View and print your payroll information
- Enter, view, and submit hours worked and leave time taken on your Timesheet

All of these tasks are completed using CAPPS Employee Self Service functionality.



This course is organized into four (4) sections. Learn how to use CAPPS Employee Self Service (ESS) functionality in each of the following sections:

- Section 1 - ESS Timesheet (*Time Reporting*)
- Section 2 - ESS eProfile (*Personal HR Information*)
- Section 3 - ESS ePay (*Paycheck/Warrant*)
- Section 4 - Review



Throughout this training you will be introduced to various character guides. They will take you through your training experience. I will return to help you with your course reviews (knowledge checks).



Betty



George



Carol



Susan



Richard



Amy



Mike

Now that you have met everyone and you are familiar with the structure of this course, lets move on to our first section.



Section 1

ESS Timesheet



capps

Centralized Accounting and Payroll/Personnel System

Learn how to manage your time reporting activities in the CAPPS systems:

- Learn key terms
- Understand the timesheet notification process
- Learn how to identify the different time reporting categories and determine your category
- Explore the various components of the Timesheet
- Learn how to enter time worked and leave time taken on the Timesheet
- Understand the various Time Reporting Codes (TRCs) used for entering time worked and leave time taken on the Timesheet
- Learn how to submit a Timesheet for approval
- View current timesheet status
- View available leave balances



Section 1 - Lesson Outline



Centralized Accounting and Payroll/Personnel System

1	CAPPS Time Reporting Overview	5 min
2	Time Reporting Essentials	30 min
3	Entering Time Worked and Leave Time Taken	60 min
4	View Timesheet Status	5 min
5	Viewing Time and Leave Balances	10 min
6	Knowledge Check	10 min

1 CAPPS Time Reporting Overview

5 min

- Learn Key Terminology.
- Understand the time reporting process and the various roles and responsibilities around timekeeping.
- *Further information specific to your agency may be available on the [Agency Partnership Training page](#) and select your agency name to view Employee Self Service support material.*

2 Time Reporting Essentials

30 min

3 Entering Time Worked and Leave Time Taken

60 min

4 View Timesheet Status

5 min

Key Terms and Definitions



Centralized Accounting and Payroll/Personnel System

Key Terms	Definition
Timesheet	The Timesheet is used to track hours worked and leave time taken for agency employees.
Time Reporting Codes (TRC)	TRCs are used to identify the type of hours being entered on the timesheet. For example: when sick leave taken is entered on a timesheet the hours entered are assigned the TRC for sick leave taken (SICKT). All time on the timesheet is associated to a TRC. Each different type of time has its own unique TRC. For example: Regular Hours Worked is "REGHR" and Annual Leave is "ANLVT".
Time Exceptions	Time Exceptions are warnings and errors to indicate a problem with a time reporter's time.
Reported Time	Reported time is the hours that an employee enters on their Timesheet.

Key Terms and Definitions



Centralized Accounting and Payroll/Personnel System

Key Terms	Definition
Payable Time	Payable time is the result of reported time that an employee has entered on their Timesheet and has been approved by their manager. It also includes regular scheduled hours that do not need to be entered on the timesheet.
Time and Labor	Time and Labor is an integrated solution in CAPPS that involves all the processes related to time worked or leave time taken for employees. It supports the time reporting needs of a wide range of business functions such as payroll, CAPPS Financials, projects, and labor allocation cost. Information entered in Time and Labor is processed through payroll.
Labor Account Code (LAC)	The LAC is used to track hours for a specific purpose. A project is an example that may have a LAC assigned. This information does not integrate with Financials/Commitment Accounting. This field is used for reporting purposes.
Override Reason Code (ORC)	ORCs are used for tracking purposes to identify periods of time that are worked for a specific reason such as recording time worked during a disaster.

Key Terms and Definitions



Centralized Accounting and Payroll/Personnel System

Key Terms	Definition
Positive Time Reporter	Positive Time Reporters are hourly paid employees. An assigned schedule does not appear on their Timesheet. Positive Time Reporters need to enter all hours physically worked or leave taken on their Timesheet in order to get paid.
Exception Time Reporter	Exception Time Reporters are Exception Hourly (salaried) employees. Their Timesheet reflects an assigned schedule with the applicable daily hours. Exception Time Reporters enter time on the timesheet only when it deviates from their assigned scheduled hours, or when an ORC or LAC is applicable. This includes hours worked over their regular scheduled hours and any leave time taken during their scheduled hours.
FMLA ID	This field is used to track FMLA hours. The FMLA ID number is assigned by your Human Resources Representative and manually entered.

Key Roles & Responsibilities



Centralized Accounting and Payroll/Personnel System

Roles	Responsibilities
Employee	This role is responsible for making sure that all the hours reflected on their timesheet are accurate. This includes physical hours worked and leave time taken for Positive Time Reporters and Exception Time Reporters.
Manager	This role is responsible for monitoring, reviewing, and approving time worked or leave time taken entered on the employee Timesheet. Managers can also enter time on behalf of an employee.
Time Administrator	This role performs the duties of the manager on behalf of the manager.
Agency Super User	This role provides oversight to the other roles and can monitor, review, approve and enter time on behalf of an employee. This role also has the authority to correct exceptions that occur from Time Admin processing, and can run reports and queries at an agency level.

Time Reporting Process

Employee (*Reported Time*)

Exception Time Reporter – Enters only hours that deviate from their regular scheduled hours
Positive Time Reporter – Enters all hours physically worked and leave taken



Time entered by the employee or defaulted from an employee's schedule is known as **Reported Time**.

Manager

Approve - or - **Deny**



Managers approve Reported Time. Once approved, a process is run that converts the 'Reported Time' to 'Payable Time'. Payable Time is then picked up by the next payroll cycle.

Scheduled hours for Exception Time Reporters do not require the approval of the manager. Only time entered as an exception/deviation from the employee's schedule requires manager approval.



Prior to denying time entered on the Timesheet, managers and employees have the option to correct the Timesheet. If a manager makes a change or denies the Timesheet, the employee will receive an email notification. Once it has been "denied" it must be re-entered if it was originally entered incorrectly.

When the Time Administration Process runs, it produces one to two outcomes:

1. It converts Reported Time to Payable Time, making it ready for payroll, or
2. If there is an error on the Timesheet, it will create an Exception on the Timesheet.



Payable Time

Payable Time is picked up in the next Payroll Cycle in order for the employee to be compensated.

Exceptions

Exceptions are “errors” on the Timesheet. All exceptions need to be cleared in order for the employee to receive compensation for the hours in question.

Agency Super Users work with managers to correct exceptions. If a correction is made on an employee’s Timesheet the employee will receive an email notification.

When there is an exception on the employee’s Timesheet, a banner will flash across the top of their Timesheet that reads:



This employee has an Exception

It is important to note: When a Timesheet has an exception the employee and the manager will be locked out of the Timesheet until the exception has been cleared.

1	CAPPS Time Reporting Overview	5 min
2	Time Reporting Essentials	30 min
	<ul style="list-style-type: none">▪ Learn the different reporting categories and identify your category.▪ Learn how Time Reporting Codes are used to identify time worked and leave time taken.▪ Learn how to use Labor Account Codes if applicable for your agency.▪ <i>Further information specific to your agency may be available on the Agency Partnership Training page and select your agency name to view Employee Self Service support material.</i>	
3	Entering Time Worked and Leave Time Taken	60 min
4	View Timesheet Status	5 min

Key Concept: Time **MUST** be entered on the Timesheet according to the correct Time Reporting Category.

How do you know your Time Reporting Category?



Betty and George enter their time worked differently on the CAPPS Timesheet. They work in different Time Reporting Categories.

Lets explore why Betty and George enter time differently.



Betty's Time Reporting Category?

My time reporting category is:
Positive Time Reporter.



This is also known as an hourly employee. In CAPPS, I am compensated according to the hours that I actually work and leave time taken.

Therefore, I enter all the hours I physically work as Regular Time on my Timesheet. I will most often use the Time Reporting Code 'REGHR' for Regular Hours Worked. I will also enter all my leave time taken using the applicable Time Reporting Code.

If I forget to enter my time, **I will not receive a paycheck.**

George's Time Reporting Category?

My time reporting category is:

Exception Time Reporter.

This is also known as a Salaried employee.

In CAPPS, I am paid according to a predefined work schedule that has been assigned to me in the system.

Therefore, I only enter hours on my Timesheet that I have physically worked over my regular scheduled hours or leave taken.

If I forget to enter my time, I will be paid for my regular scheduled hours. However, I will not bank FLSA overtime or compensatory time for the hours I physically worked over my schedule and my leave balances may not be accurate. In this scenario, I would still need to enter my hours worked over my schedule or my leave taken to ensure my time and leave records are correct.



What if I still can't tell what type of Time Reporter I am?

It's actually very easy.

If you have an assigned schedule on your timesheet, you are an **Exception Time Reporter.**

If you do not, you are a **Positive Time Reporter.**



Time Reporting Codes (TRCs)



Centralized Accounting and Payroll/Personnel System

Time Reporting Codes are used to tell the system what type of time is being entered on the Timesheet.

A list of statewide TRCs is displayed on the right. The most commonly used TRCs are underlined.

Additional TRCs may be available at your agency. Refer to [Agency specific information](#) for further details.

TRCs	Description	TRCs	Description
12CPT	12 NonExe Disaster Taken	LWPDS	Leave Without Pay - Discipline
18CPT	18 Exempt Disaster Taken	LWPEO	Leave Without Pay - Employee
<u>ADMLT</u>	<u>Administrative Leave Taken</u>	LWPES	Leave Without Pay - Empl Sick
ADOGT	Assistance Dog Training	LWPFS	Leave Without Pay - Family Sck
<u>ANLVT</u>	<u>Annual Leave Taken</u>	LWPMY	Leave Without Pay - Military
CASAT	Court Appoint Spec Advoc Taken	LWPPR	Leave Without Pay - Parental
<u>COMPT</u>	<u>Compensatory Time Taken</u>	LWPWC	Leave Without Pay - Wrkrs Comp
DNRBL	Blood Donor	MLTYT	Military Leave Taken
DNRBM	Bone Marrow Donor	NGADT	National Guard Active Duty Tak
DNROG	Organ Donor	OHCPT	Optional Holiday Comp Taken
EDACT	Educational Activities	ONCLL	On-Call Duty
EDULV	Education Leave	RDCRS	Red Cross Disaster Service
EMGNY	Emergency Leave	REGDS	Reg Hrs Wrkd - Disaster Servcs
EMTTR	Volunteer EMT Training	<u>REGHR</u>	Regular Hours Worked
ESCKT	Extended Sick Leave Taken	<u>REGHW</u>	Reg Hrs Worked on Holiday
EXERT	Exercise Leave Taken	REGOH	RegHol Work in lieu of Opt Hol
<u>FLEXS</u>	<u>Flexing Schedule</u>	RLELV	Rsrv Law Enfrcmnt Off Training
FLSAP	Banked Overtime Paid	SCKPT	Sick Leave Pool Taken
FLSAT	Banked Overtime Taken	<u>SICKT</u>	Sick Leave Taken
FPRNT	Foster Parent Leave	SPECT	Special Leave Taken
FTNST	Emergency Fitness Leave Taken	VFFTR	Volunteer Firefighter Training
HCMPT	Holiday Comp Taken	VOTES	Leave to Vote
JURYD	Jury Duty	WELLT	Wellness Leave Taken

1	CAPPS Time Reporting Overview	5 min
2	Time Reporting Essentials	30 min
3	Entering Time Worked and Leave Time Taken	60 min
	<ul style="list-style-type: none">▪ Understand the components of the Timesheet.▪ Learn how to enter regular hours worked for positive time reporters (exception hourly).▪ Learn how to enter leave time taken, such as: comp time, sick time taken, and annual leave.▪ Learn how to enter flex time and time for multiple leaves taken.▪ Learn how to enter Holiday Time, such as: worked, not worked, holiday comp time, etc.▪ Learn how to complete the Employee Time Certification.▪ <i>Further information specific to your agency may be available on the Agency Partnership Training page and select your agency name to view Employee Self Service support material.</i>	
4	View Timesheet Status	5 min

Components on the Timesheet are the same for Betty the **Positive Time Reporter** and George the **Exception Time Reporter**.
Complete the exercise below:



Exercise

The following exercise provides step-by-step instructions on how to perform the following task in CAPPs:

Understand Timesheet Components

Scenario 1: *Understanding the Components of the Timesheet*

[View exercise scenario](#) (opens a new web browser).

After completing the exercise check, close the browser tab and return to the course.



Remember, Betty is a **Positive Time Reporter**.

Betty needs to enter all the hours she physically works or leave taken on her Timesheet in order to receive compensation on her paycheck.



Exercises

The following exercise provides step-by-step instructions on how to perform the following task in CAPPs:

Positive Time Reporter

Scenario 2: Enter Regular Hours Worked-Positive Time Reporter

Scenario 3: Enter Overtime Worked-Positive Time Reporter

Scenario 4: Entering Leave Time Taken-Positive Time Reporter

[View exercise scenarios](#) (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.

Exercises

The following exercises provide step-by-step instructions on how to perform the following tasks for Exception Time Reporting in CAPPs:

How to enter hours physically worked over your scheduled hours.

Scenario 5: Enter Overtime/Comp Time Worked

Scenario 6: Enter Time for Flex Schedule

How to enter leave time taken (Scheduled hours not worked)

Scenario 7: Enter Annual Leave Taken

Scenario 8: Enter Sick Time Taken

Scenario 9: Enter Regular Comp Time Taken

Scenario 10: Enter FLSA Overtime Taken

Scenario 11: Entering Leave Without Pay

Scenario 12: Entering Multiple Leave Types

[View exercise scenarios](#) (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.

Remember, George is an **Exception Time Reporter**. George is compensated according to his regular scheduled hours. Therefore, he only enters time worked or leave time taken on the Timesheet.



Exception Time Reporters and Positive Time Reporters enter Holiday time the same.



Exercises

The following exercises provide step-by-step instructions on how to perform the following tasks for Exception Time Reporting in CAPPs:

How to enter holiday time

Scenario 13: Enter Time Worked on a Schedule Holiday

Scenario 14: Enter Optional Holiday Time Taken and Work a Holiday

[View exercise scenarios](#) (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.



Labor Account Codes (LACs) are used to track hours worked for a specific purpose. Hours physically worked can be associated to a LAC. Hours may be allocated across LACs and across days.

Exercise

The following exercise provides step-by-step instructions on how to perform the following task in CAPPs:

Using Labor Account Codes

Scenario 15: Allocating hours worked to a LAC

Scenario 16: Allocating hours worked to multiple LACs

[View exercise scenarios](#) (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.

LACs are Agency Specific.

Employees should consult with their manager before entering a specific LAC.

Further information specific to your agency may be available on the [Agency Partnership Training page](#). Select your agency name to view Employee Self Service support material.

An agency may require its employees to complete an Employee Time Certification. This could be for an hourly, salaried, or contingent worker. The process is generally done once a month for the prior month. To learn how to perform this process complete the exercise listed below:



Exercise

The following exercise provides step-by-step instructions on how to perform the following task in CAPPs:

Complete an Employee Time Certification

Scenario 17: Employee Time Certification

[View exercise scenario](#) (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.



1	CAPPS Time Reporting Overview	5 min
2	Time Reporting Essentials	30 min
3	Entering Time Worked and Leave Time Taken	60 min
4	View Timesheet Status	5 min

- *View Timesheet Status*



Hours entered on the timesheet go through several stages as they get ready to be processed by payroll. After the employee enters their hours on the timesheet and selects E-sign & Submit they move through the following stages:

Needs Approval – The hours are waiting for the manager to approve or deny.

Approved or Denied – After the manager has approved or denied the hours.

Submitted – Once the manager approves the hours the reported hours are processed by Time Administration and sent to payroll.

Once a Timesheet has been submitted, the hours are grayed out on the Timesheet and cannot be changed by the employee. If your manager denied your hours, because you need to make a change, you will need to re-enter the correct hours on a new line.

Note: Whenever a change is made to an employee's Timesheet, the employee will receive an email notification.

5

Viewing Time and Leave Balances

10 min

- Learn how to view time and leave balances.

Exercises

The following exercise provides step-by-step instructions on how to perform the following tasks in CAPPS:

Viewing Time, Status, and Leave Balances

Scenario 1: View Leave Balances/Expirations

Scenario 2: Employee Monthly Time Report

[View exercise scenarios](#) (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.

5 Viewing Time and Leave Balances

10 min

6 Knowledge Check

10 min

This section is almost done. It is now time to review what was presented in this course. Next you will be presented with a series of questions covering important things to remember.

[View Knowledge Check](#) (opens a new web browser).

After completing the knowledge check, close the browser tab and return to the course.



Section 2

eProfile



capps

Centralized Accounting and Payroll/Personnel System

Learn how to view and update your Human Resources information in the CAPPS systems:

- View or update your personal information
- View or update phone number and mailing address
- Request a name change
- Update your information release indicator
- Maintain disability status





CAPPS Employee Self Service now offers employees the opportunity to play a role in managing their own Human Resources information, such as: updating their personal information, or adding an emergency contact.

Complete the exercises in this section to learn more.

1 eProfile Human Resources Personal Information

30 min

Exercises

The following exercises provide step-by-step instructions on how to perform the following tasks in CAPPs:

How to view or update Human Resources information

- Scenario 1:** View My Personal Information
- Scenario 2:** Edit Emergency Contacts
- Scenario 3:** Edit Phone Number
- Scenario 4:** Edit Mailing Addresses
- Scenario 5:** Request Name Change
- Scenario 6:** Information Release Indicator
- Scenario 7:** Maintain Disability Indicator
- Scenario 8:** BRP Leveling / Non-Leveling



[View exercise scenarios](#) (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.

Section 3

ePay



Centralized Accounting and Payroll/Personnel System

Learn how to view and/or update your payroll information in CAPPS:

- View or print your earnings statement and compensation history
- View or update direct deposit
- View, add, or update voluntary or charitable deductions
- Update your information release indicator
- View, update, or print tax information



Section 3 Lesson Outline



Centralized Accounting and Payroll/Personnel System

1	View and Print Earnings Statement	5 min
2	Add or Change Direct Deposit Information	5 min
3	View, Add, or Update Voluntary or Charitable Deductions	10 min
4	View Tax Information	10 min

Further information specific to your agency may be available on the [Agency Partnership Training page](#) and select your agency name to view Employee Self Service support material.

1 View and Print Earnings Statement

5 min

Exercises

The following exercise provides step-by-step instructions on how to perform the following tasks in CAPPs:

View your earnings information

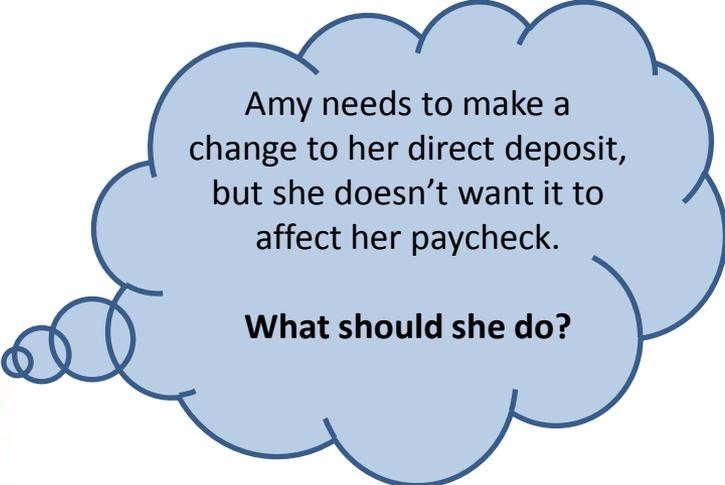
Scenario 1: View/print your earnings statement (paycheck)

Scenario 2: View compensation history

[View exercise scenarios](#) (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.



A large, light blue thought bubble with a dark blue outline and three smaller circles leading to it from the left. It contains text about a direct deposit change.

Amy needs to make a change to her direct deposit, but she doesn't want it to affect her paycheck.

What should she do?



IMPORTANT NOTE: the timeframe around when you make a change to your direct deposit can directly affect the outcome of your deposit. You should check with your Human Resources Representative or Payroll Administrator before making the change in CAPPS to avoid any unwanted interruptions.

Continue to the next slide to complete the direct deposit exercise.

2 Add or Change Direct Deposit Information

5 min

Exercise

The following exercise provides step-by-step instructions on how to perform the following tasks in CAPPs:

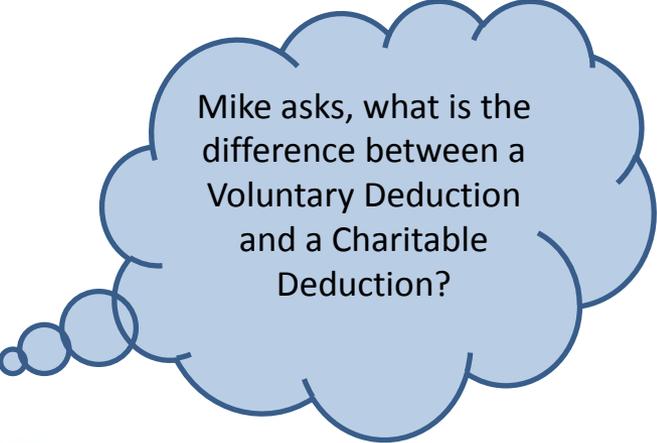
Manage your direct deposit information

Scenario 1: View/Edit Direct Deposit

[View exercise scenario](#) (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.



A large, light blue thought bubble with a dark blue outline, containing text. It is connected to a man's head by three smaller, lighter blue circles of decreasing size.

Mike asks, what is the difference between a Voluntary Deduction and a Charitable Deduction?



Continue to the next slide to complete the exercises.

Voluntary Deductions are just that, voluntary. As an employee you can opt to deduct a flat amount from a paycheck to be direct deposited at a Credit Union, or for Union Dues.

Voluntary Deductions can begin or end whenever you like and can be automatically stopped by setting a total maximum amount to be deducted, or by setting an actual end date.

There is **no limit** to the number of voluntary deductions.

Charitable Deductions can only be established during open enrollment. You elect a charitable institution from a predetermined list in the program.

After open enrollment has closed, you cannot add/change your charitable elections until the next election period. However, you can edit the dollar amount you elected to give.

As an employee you can have **up to three (3)** charitable deductions.

3

View, Add, or Update Voluntary or Charitable Deductions

10 min

Exercises

The following exercise provides step-by-step instructions on how to perform the following tasks in CAPPs:

Manage your deductions

Scenario 1: Voluntary deduction

Scenario 2: 2015 Charitable deductions

[View exercise scenarios](#) (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.





I need to get a copy of my W2. I remember Carol in Human Resources told me that I can print a copy from my desk using CAPPS Employee Self Service.

To learn how to view and/or print tax documents, continue to the next slide and complete the exercises.

4

View Tax Information

10 min

Exercises

The following exercise provides step-by-step instructions on how to perform the following tasks in CAPPS:

Manage your tax information

Scenario 1: W-4 tax information

Scenario 2: View/Print W-2 and W-2c information

Scenario 3: W-2 and W-2c Consent

[View exercise scenarios](#) (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.



Section 4

Review



Centralized Accounting and Payroll/Personnel System

1

Knowledge Check

10 min

This course is almost done. It is now time to review what was presented in this course. Next you will be presented with a series of questions covering important things to remember.

[View Knowledge Check](#) (opens a new web browser).

**After completing the knowledge check,
close the browser tab and return to the course.**



This completes the course.

Hope you enjoyed this course, see you next time!