

A banner with a blue and white abstract background featuring glowing circles and lines. The text is centered and reads:

CAPPS HR/PAYROLL
End-User Training (EUT)

EUT Course - 101

**FUNDAMENTALS AND
EMPLOYEE SELF-SERVICE**

PeopleSoft 9.2

November 2016

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Employee Self Service

Course 100 Employee Self Service

Section 1 - CAPPS Fundamentals

Section 1 - CAPPS Fundamentals

Section 1 - CAPPS Fundamentals has 4 lessons:

- Lesson 1 - CAPPS Overview
- Lesson 2 - How to Access CAPPS
- Lesson 3 - Using CAPPS Navigation Features
- Lesson 4 - Using the Search Feature to Retrieve Information

Lesson 1 - How to Access CAPPS

Section 1, Lesson 1

CAPPS Fundamentals

Learn how to sign-in to the CAPPS system

Section 1 - Lesson 1 Exercise - Scenario 1: Learn how to sign-in to the CAPPS system

Procedure

This lesson shows you how to log into the CAPPS Enterprise Portal and the CAPPS HR/Payroll system. It also shows you your menu options and choices.

Step	Action
1.	This Login page is the gateway to the CAPPS Enterprise Portal and the CAPPS HR/Payroll system as well as other CAPPS PeopleSoft applications. It is recommended that you save this URL as a Favorite in your Internet browser.

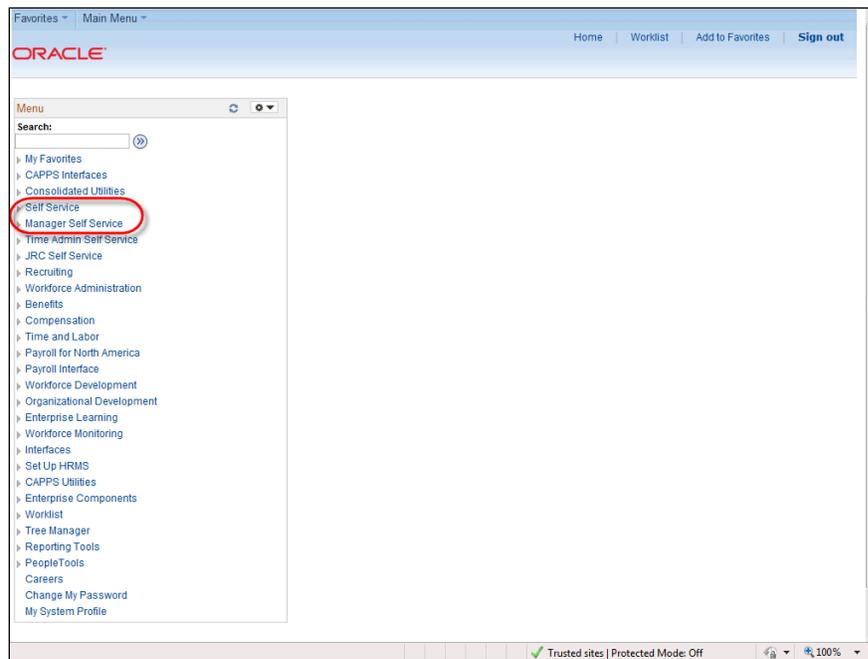
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Step	Action
2.	<p>The Login page is where you will enter your User ID and Secure Password in the appropriate fields.</p> <p>If you do not have this information, please contact your agency password support personnel.</p> <p>The Secure Password is Case Sensitive. As you enter your password, the system will mask your entry with asterisks.</p>
3.	<p>Once you have entered the User ID and Secure Password you will click the Sign In button.</p>
4.	<p>This page contains the CAPPS Enterprise Portal. The views on the Portal will vary according to individual security roles.</p> <p>Next you will take a look at each of the components within the Enterprise Portal.</p>
5.	<p>This is the CAPPS HR/Payroll Application Link. This link takes you to the PeopleSoft Menu with choices and options based on (1) your role in the system and (2) your security access to the system.</p> <p>If you are a user with access to both HR/Payroll and Finance applications then you will also see a FIN Application Link further down the page.</p>
6.	<p>Below the HR/Payroll application link are the Employee Self-Service and Manager Self-Service links.</p> <p>The Self-Service options are available to all employees.</p>
7.	<p>The Manager Self-Service links are available to any employee with a role as a Manager in the system.</p> <p>Remember the application links will appear according to the user profile.</p>
8.	<p>The Worklist will only appear for users that have Worklist items.</p> <p>In this example, the user has an HR/Payroll Worklist.</p>
9.	<p>Common Links are static and will appear for everyone.</p> <p>Notice the link to Change Password.</p>
10.	<p>Other Portal Links are for users specifically granted access to UAT, Maintenance, and Sandbox.</p>

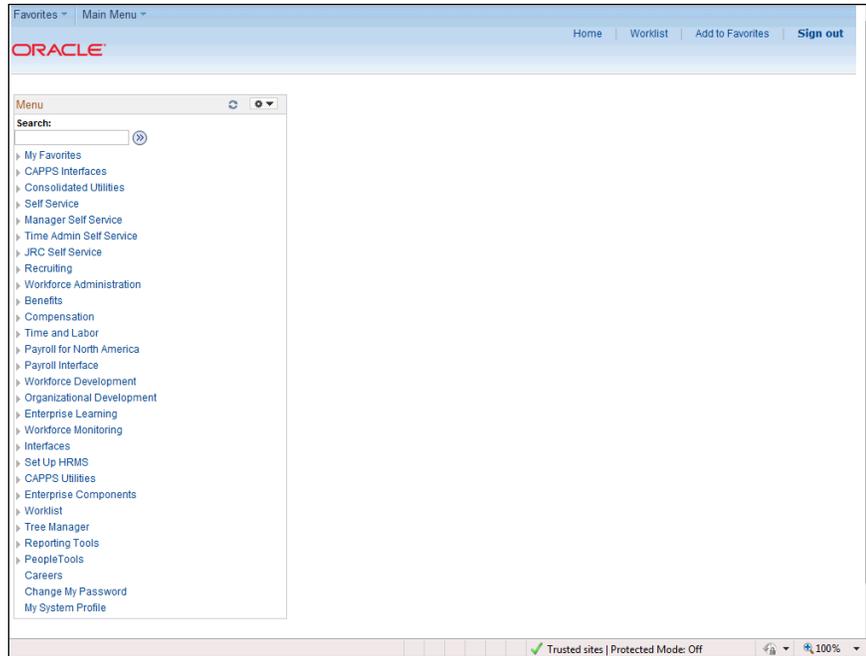
Step	Action
11.	New Content Pagelets appear in this area by suite (HR/Payroll and/or FIN). They will contain information about downtime, scheduled maintenance, and timely reminders.
12.	Next you will see how the Main Menu can be used as an alternate way to access the same information.
13.	The CAPPS HR Portal also displays a Main Menu with choices and options based on your role and security in the system. This is an alternate way to navigate to information in the system.
14.	You can access Employee Self-Service from here as well.
15.	After selecting the HR/Payroll link , you will see the CAPPS HR/Payroll Menu options.



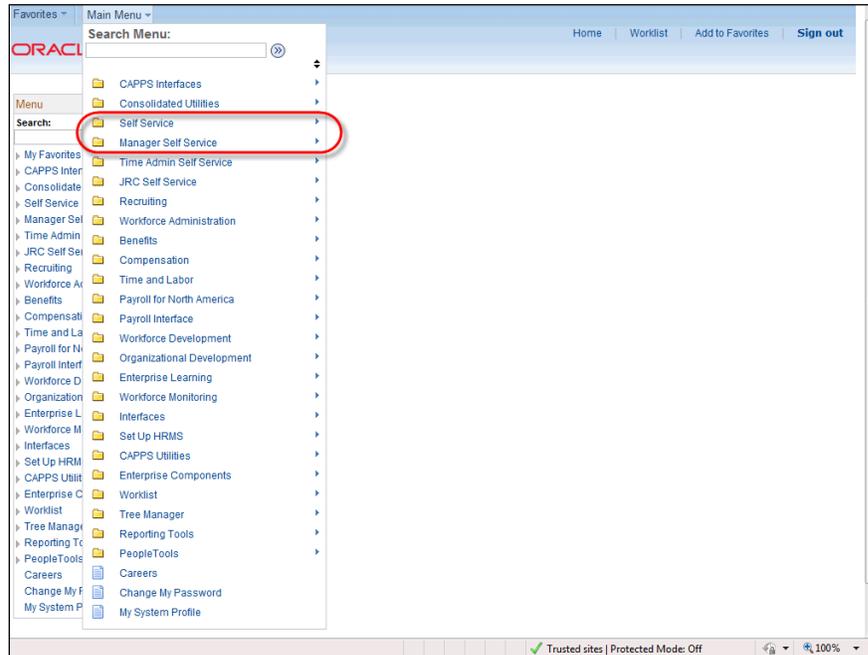
Step	Action
16.	The system now displays the CAPPS HR/Payroll Application Main Menu. Please note that in addition to accessing ESS or MSS from the portal (the previous screen shots), you can also navigate to (Employee) Self Service or Manager Self Service from this Menu.

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Step	Action
17.	Click the Main Menu button to see the same list of menu options and choices. 



Step	Action
18.	<p>Note that you can go to (Employee) Self Service or Manager Self Service from this Main Menu list as well.</p> <p>Most employees will see a limited number of choices when they login to the CAPPS HR/Payroll system.</p>



Step	Action
19.	<p>Because of security requirements, CAPPS logs you out of your application after a period of inactivity.</p> <p>A few minutes prior to timing out, the system provides a popup warning telling you that your browser session is about to end.</p> <p>If you click OK, though, the timer is reset, and your current session continues.</p>
20.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

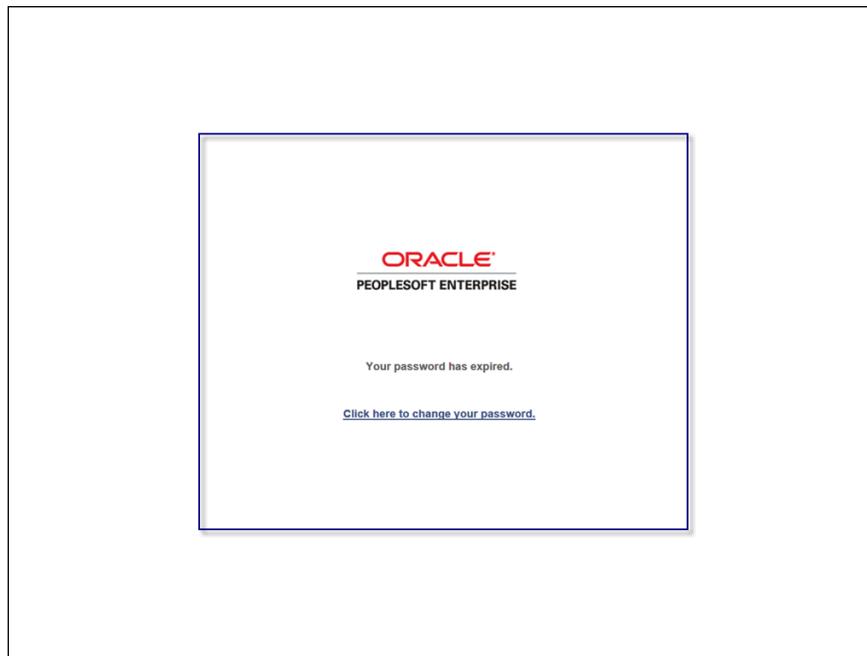
Learn how to change your password

Section 1 - Lesson 1 Exercise - Scenario 2: Learn how to change your password

Procedure

This lesson shows you how to reset a forgotten password, how to change a password, and how to set up a Password Hint.

Step	Action
1.	<p>CAPPS HR/Payroll Password Reset</p> <p>If you have forgotten your password, contact your agency password support personnel.</p> <p>You will be sent a temporary password.</p>
2.	You will receive a temporary password in an email.
3.	<p>Enter your User ID and temporary Password to start the process of changing your password.</p> <p>In this example, you have entered your User ID and Secure Password already.</p>



Step	Action
4.	<p>The system tells you that your temporary password has expired.</p> <p>Click on the link to change your password.</p> <p>Click the Change Password link.</p> <p>Click here to change your password.</p>

Step	Action
5.	<p>Enter the temporary password (the one you received in an email) in the *Current Password field.</p> <p>Enter a *New Password, and enter it again in the *Confirm Password field.</p> <p>Click the Change Password link.</p> 
6.	The system confirms that your password has been changed.
7.	<p>How to Set Up Password Hints</p> <p>In CAPPS HR/Payroll you can set up a password hint so that you can reset your own password.</p> <p>On the Portal page, you would select the Maintain Password Hint link under the Common Links section.</p>
8.	<p>The system asks you to select a question from the drop down list.</p> <p>In this example, your question will be <i>"What was the name of your first pet?"</i> You may use the drop down arrow to select a different question. The Response must be at least 5 characters long.</p> <p>After selecting your question, entering your response information, you will click the Save button.</p>
9.	<p>Manual Password Reset</p> <p>You can also manually reset your own password. This method assumes that you are already logged into the CAPPS Enterprise Portal.</p> <p>You would click the Change Password link near the bottom under Common Links.</p>
10.	<p>Enter your current password in the *Current Password field.</p> <p>Enter a *New Password, and enter it again in the *Confirm Password field.</p> <p>Click the Change Password link.</p> 
11.	The system confirms that your password has been changed.

Step	Action
12.	<p>How to use "I forgot/Change my password."</p> <p>If you have forgotten your password and you have set up a password hint, you can have a temporary password sent to you in an email. The system uses the email address stored in your User ID account.</p> <p>NOTE: You may have an email address on file in the system, but the system will only use a specific email address from the email field labeled "Business" in your User ID profile. If you do not receive the temporary password email, contact your agency password support personnel.</p>
13.	To begin, click the I forgot/Change my password link on the CAPPS login page.
14.	Enter your User ID , and then click on the Continue button.
15.	<p>The system asks you for the Response to your Password Hint that you previously set up.</p> <p>You then click on the Email New Password button.</p>
16.	<p>If your Response is valid, the system will email you (to the email address on file) a temporary password.</p> <p>NOTE: You may have an email address on file in the system, but the system will only use a specific email address from the email field labeled "Business" in your User ID profile. If you do not receive the temporary password email, contact your agency password support personnel.</p>
17.	The system sends you an email.
18.	<p>Enter your User ID and temporary Password to start the process of changing your password.</p> <p>In this example, we have entered your User ID and Secure Password already.</p>
19.	<p>The system tells you that your temporary password has expired.</p> <p>Click on the link to change your password.</p> <p>Click the Change Password link.</p> <p>Click here to change your password.</p>

Step	Action
20.	<p>Enter the temporary password (the one you received in the email) in the *Current Password field.</p> <p>Enter a *New Password, and enter it again in the *Confirm Password field.</p> <p>Click the Change Password link.</p> 
21.	The system confirms that your password has been changed.
22.	Congratulations! You have successfully completed this lesson. End of Procedure.

Lesson 2 - Using CAPPS Navigation Features

Section 1, Lesson 2

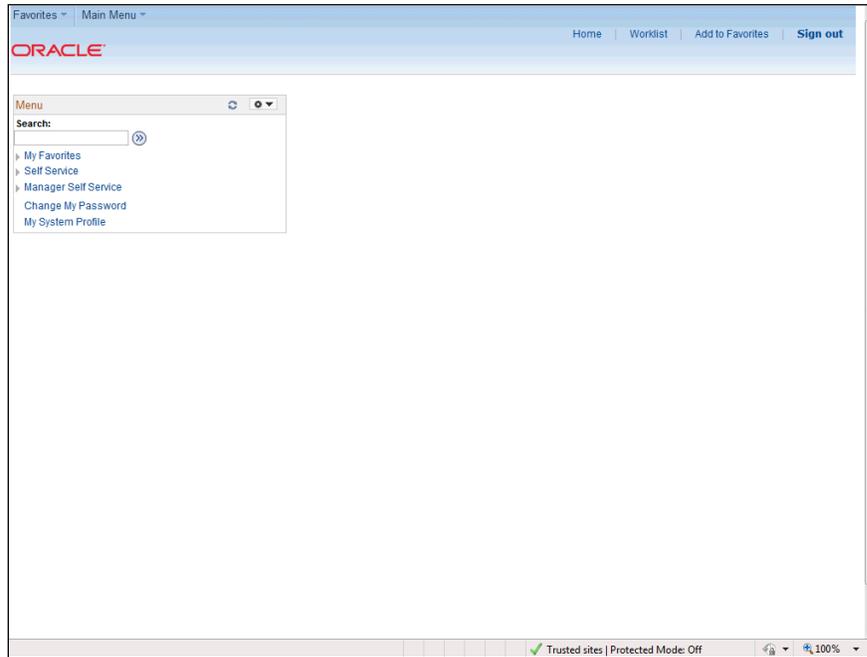
Using CAPPS Navigation Features

Learn how to add and delete Favorites

Section 1 - Lesson 2 Exercise - Scenario 1: Learn how to add and delete Favorites

Procedure

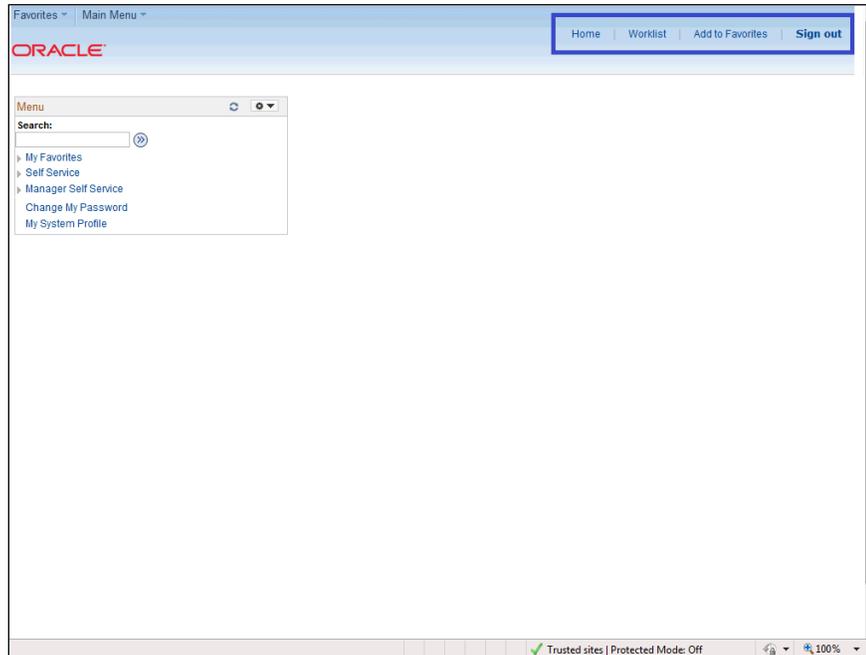
In this lesson you will learn how to add and delete Favorites.



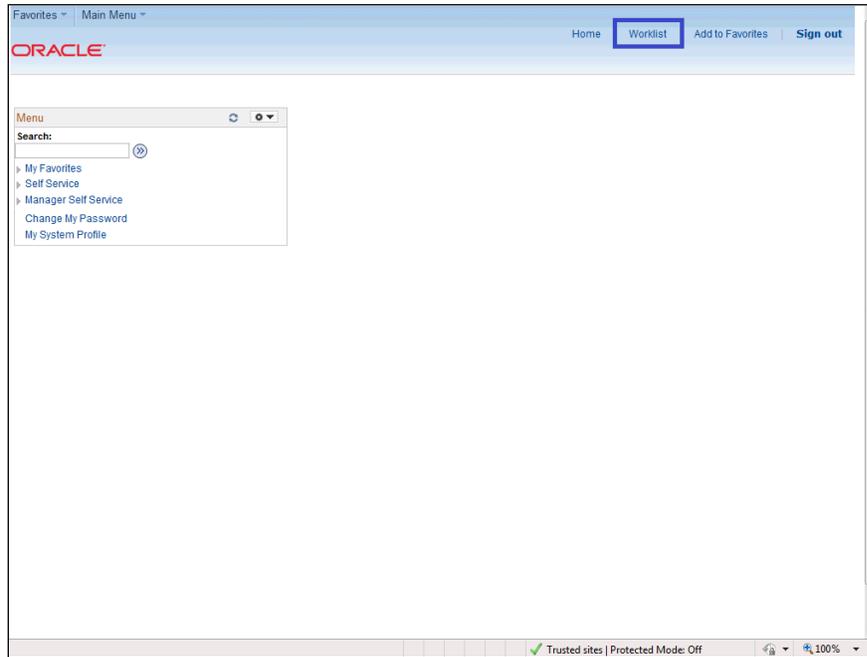
Step	Action
1.	<p>The CAPPS HR/Payroll browser-based interface contains navigation elements that are the same as those found in other CAPPS applications.</p> <p>After you sign in to CAPPS, your Home page appears.</p>

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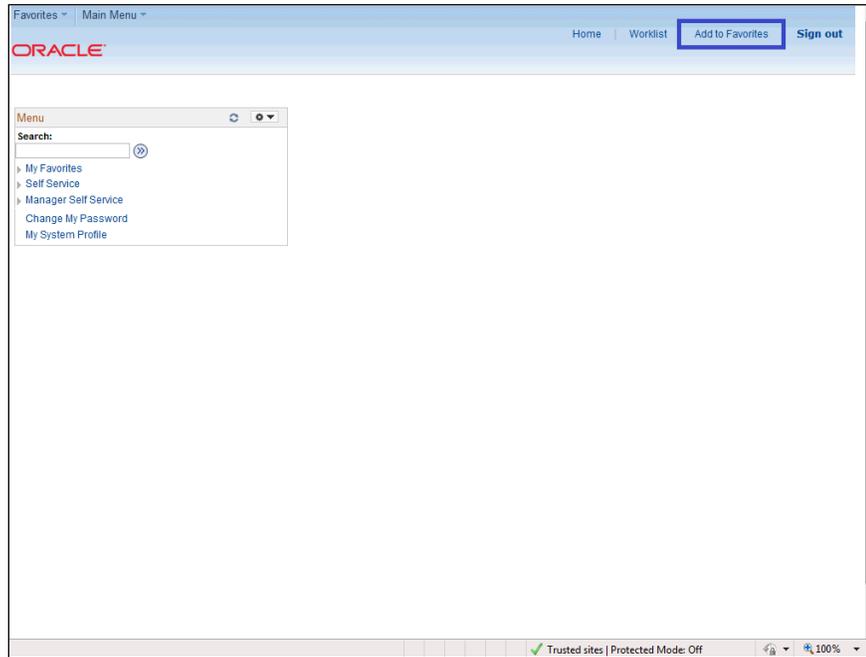
Step	Action
2.	<p>A universal navigation header will be displayed at the top of every page. This header generally contains the following links:</p> <ul style="list-style-type: none">• Home• Worklist• Add to Favorites• Sign out <p>Some links might not be available to a user; the presence or absence of a link is based on user security settings, as well as application implementation rules.</p>
3.	<p>Selecting the Home link will automatically return you this page.</p>



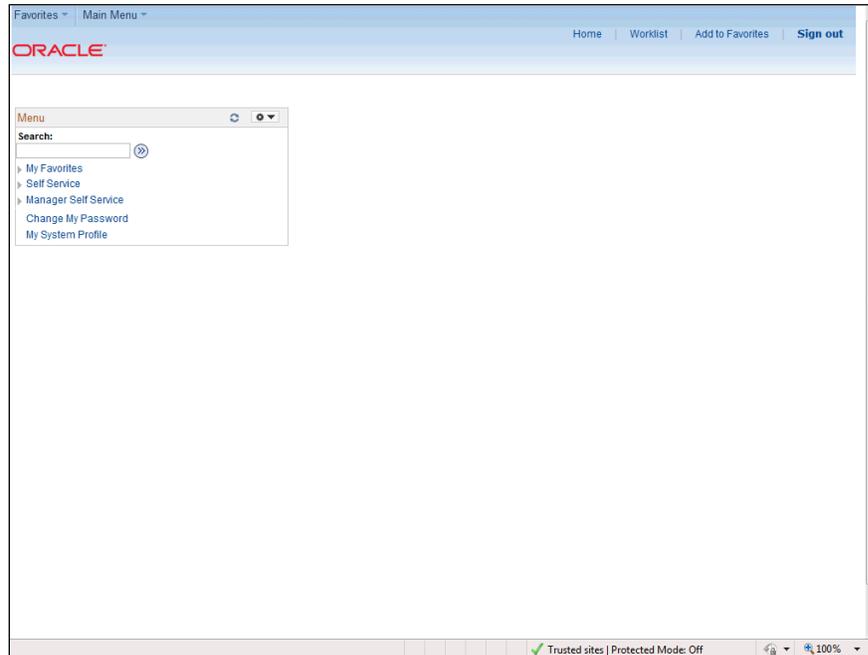
Step	Action
4.	<p>The Worklist link tells the system to go to your worklist page. Remember that the worklists for HR/Payroll is available on the Enterprise Portal Page as well.</p> <p>A worklist is an organized list of items waiting for your attention. The system automatically generates your worklist when you use a workflow-enabled application.</p> <p>The Worklist page provides summary information about all items on your personal worklist.</p> <p>The Worklist page also provides links for you to view additional details about an item, navigate to a page where you can perform an action (such as Approve) on an item, and (optionally) reassign a work item to someone else.</p> <p>If you are involved in approving items, those approvals will be worked from the Worklist.</p>

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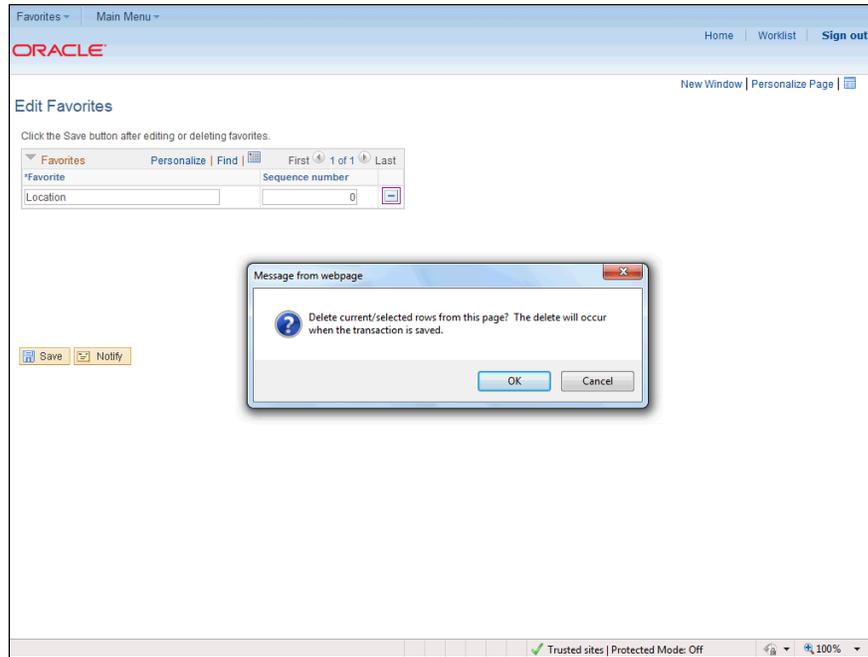


Step	Action
5.	<p>Add to Favorites is a feature similar to a browser bookmark; use it for frequently used folders and content pages.</p> <p>Use Add to Favorites to add the current page to your list of favorites; Favorites can be accessed from the Favorites menu in the upper right corner of this page.</p>

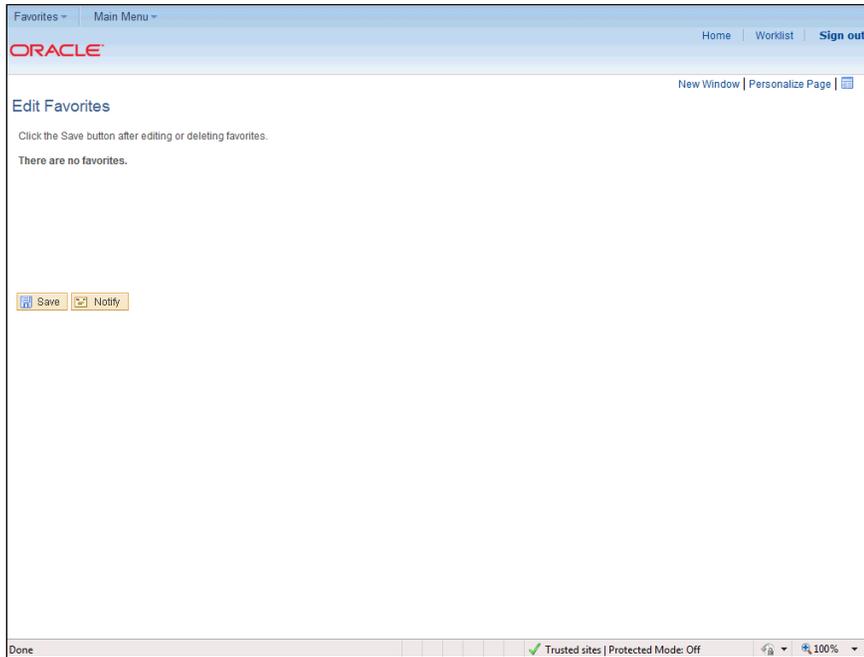


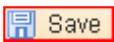
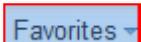
Step	Action
6.	<p>The Favorites menu grants quick access to frequently used pages that you have added to My Favorites; the system also maintains a list of Recently Used pages in this location.</p> <p>Clicking a link from the Favorites menu is a direct path to the page, and will bypass menu navigation.</p> <p>Click the Favorites button.</p> 
7.	<p>The Favorites menu has two sections.</p> <p>The top section will list Recently Used pages, or pages that you have accessed.</p> <p>The bottom section allows you to Add or Edit your My Favorites list.</p> <p>This example shows that you recently accessed the Location page.</p>

Step	Action
8.	<p>To add a page to the Favorites menu, navigate to the page to be added, then click the Add to Favorites link.</p> <p>In this example you have already navigated to the Location search page. From the Location search page, click the Add to Favorites link.</p> <p></p>
9.	<p>You can either accept the default Description, or enter your own description for this page.</p> <p>In this example, accept the default description of Location.</p> <p>Click the OK button.</p> <p></p>
10.	<p>The system displays a message telling you that the favorite has been saved.</p> <p>Click the OK button.</p> <p></p>
11.	<p>Click the Favorites button to see if Location was added to your list of favorites.</p> <p></p>
12.	<p>Notice how Location has been added to the My Favorites section of the Favorites menu.</p>
13.	<p>You can change the name of a Favorite or delete one from the list.</p> <p>Click the Edit Favorites menu item.</p> <p></p>
14.	<p>To edit the name of a Favorite, simply replace the entry 'Location' with one of your own choosing, and then hit the Save button.</p>
15.	<p>To delete a favorite, click the minus sign (-) next to the favorite to be deleted.</p> <p>Click the Delete row 1 button.</p> <p></p>



Step	Action
16.	<p>The system asks you to confirm your deletion. You have the option, of course, to cancel this deletion.</p> <p>Confirm deletion by clicking the OK button.</p> <div style="text-align: center;">  </div>



Step	Action
17.	<p>Save your work.</p> <p>Click the Save button.</p> 
18.	<p>You will see that Location was removed from the My Favorites list.</p> <p>Click the Favorites button.</p> 
19.	<p>Notice how Location is no longer listed under My Favorites.</p> <p>(Note that Location still appears on the Recently Used list.)</p>
20.	<p>Be sure to Sign Out of the CAPPS when you are done.</p>
21.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Lesson 3 - Using the Search Feature to retrieve information

Section 1, Lesson 3

Using the Search Feature to Retrieve Information

Learn how to use the Basic search feature

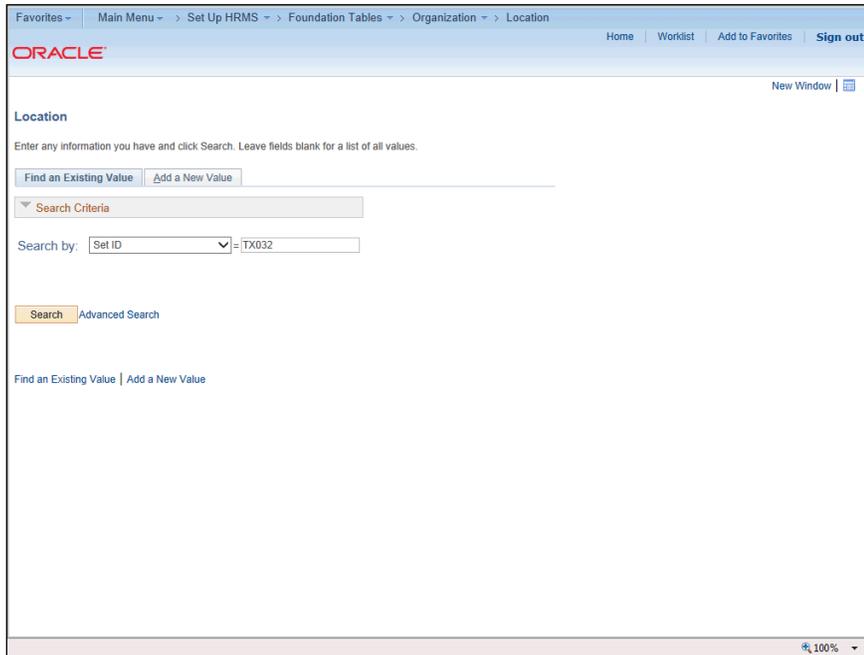
Section 1 - Lesson 3 Exercise - Scenario 1: Learn how to use the basic Search feature.

Procedure

In this lesson you will learn how to perform a basic search.

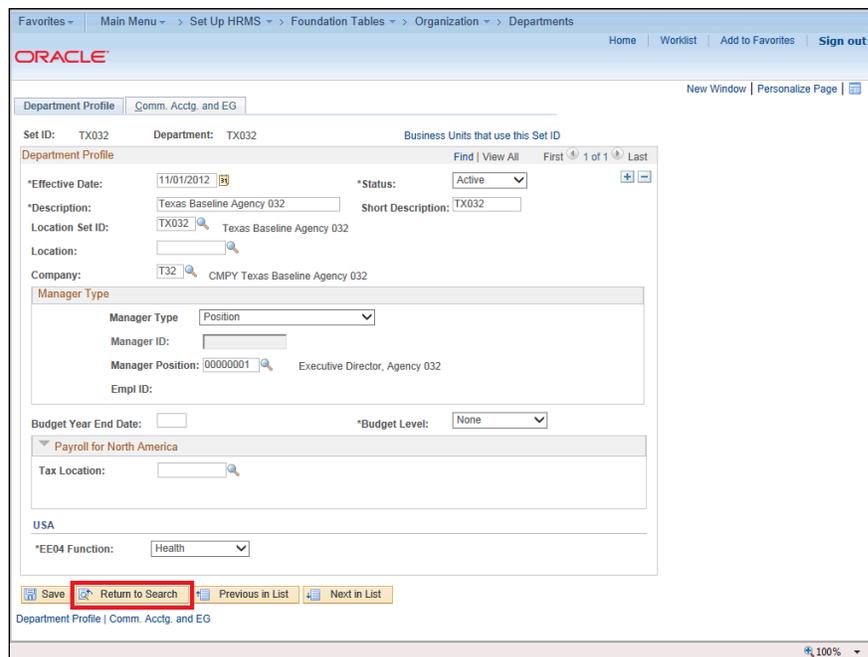
After you have navigated to a specific page, the system will display a search page. Search pages are used to define the specific information you want to retrieve.

Step	Action
1.	<p>The page displayed on the screen is the Basic Search page.</p> <p>There are two tabs on this page:</p> <ol style="list-style-type: none"> 1. Find an Existing Value 2. Add a New Value. <p>The Find an Existing Value tab allows you search for information according to a particular value or values.</p> <p>The Add a New Value allows you to add information in CAPPS. It is important to note that not all users will have security access to perform this task</p>



Step	Action
2.	<p>Typically, a Basic Search page offers one field (or at most two fields) with which you may search for data.</p> <p>The drop-down list allows you to pick which key field you want to search (this example shows SetID). A SetID is your agency number with TX for Texas.</p> <p>In this example you will use the Basic Search feature to search on SetID = TX032.</p> <p>Click the Search button.</p> 
3.	<p>After selecting the Search button, the system will display the search results in a Search Results grid. In this example 10 records were retrieved. The Agency TX032 has 10 physical locations assigned to the Agency.</p>
4.	<p>On a Basic Search page, you have the option of changing the search criteria.</p> <p>The Search by drop-down list lets you select a different search key (a different field) to search against. You can enter full or partial values for the key field.</p> <p>Click the dropdown arrow to the right of the Search by field.</p> 

Step	Action
5.	Notice the other fields that you may use as Search Criteria. The search criteria options may vary depending on the navigation used.
6.	The system has three useful buttons at the bottom of the page. Previous in List goes to the previous item from the Search Results grid.
7.	Next in List takes you to the next item from the Search Results Grid.



The screenshot shows the Oracle HRMS interface for the Department Profile of Set ID TX032. The page includes fields for Effective Date (11/01/2012), Status (Active), Description (Texas Baseline Agency 032), Location Set ID (TX032), Location (Texas Baseline Agency 032), Company (T32 - CMPY Texas Baseline Agency 032), Manager Type (Position), Manager ID, Manager Position (00000001 - Executive Director, Agency 032), Empl ID, Budget Year End Date, Budget Level (None), Payroll for North America (USA), Tax Location, and EE04 Function (Health). At the bottom, there are navigation buttons: Save, Return to Search (highlighted with a red box), Previous in List, and Next in List.

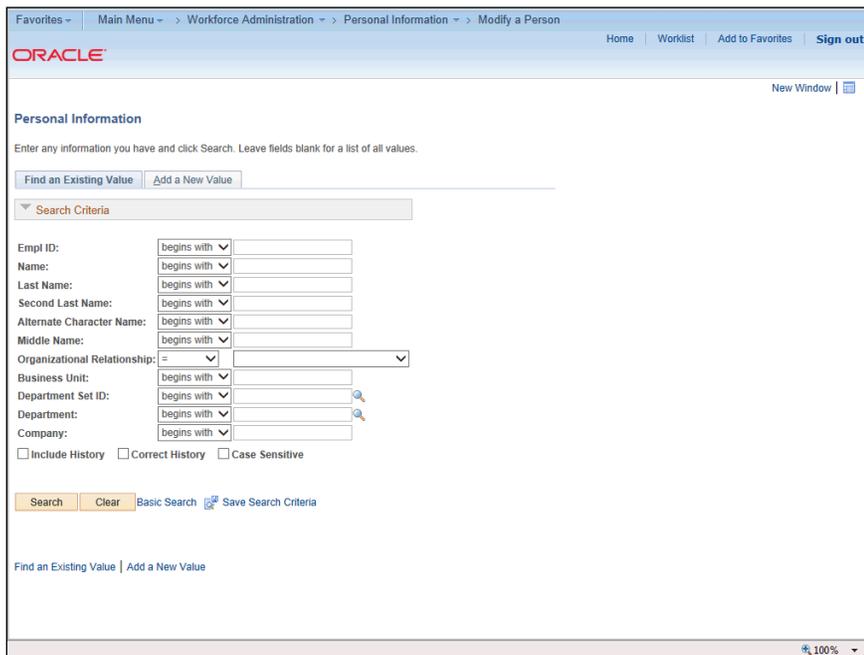
Step	Action
8.	To return to the Search Results grid or to start a new Search, click the Return to Search button.
9.	Congratulations! You have successfully completed this lesson. End of Procedure.

Learn how to use Operators and Wildcards

Section 1 - Lesson 3 Exercise - Scenario 2: Learn how to use Operators and Wildcards Procedure

This lesson introduces using **Operators** and **Wildcards** while searching in CAPPS HR/Payroll.

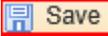
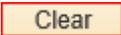
Step	Action
1.	Take a close look at the Personal Information Search Criteria page. This is an Advanced Search page, because multiple fields are available for use as criteria in narrowing down a search.



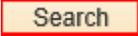
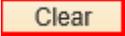
Step	Action
2.	<p>The search can be narrowed by entering criteria in more than one field, and by entering a variety of search Operators. In this example, the displayed operators are "begins with" and "=". (A more complete list of operators will be shown shortly.)</p> <p>On an Advanced Search page different operators in multiple fields can be used.</p> <p>There is limited information to look up Personal Information for an employee. The entire employee ID is not known, but it starts with a zero.</p> <p>Enter the desired information into the Empl ID begins with field. Enter "0".</p> <p>Empl ID: begins with ▼ <input style="border: 1px solid red;" type="text"/></p>

Step	Action
3.	<p>There could be hundreds (or thousands) of Empl IDs beginning with zero.</p> <p>It's known that the employee's Name begins with test.</p> <p>Enter the desired information into the Name field. Enter "test".</p> <p>Name: begins with ▼ <input type="text"/></p>
4.	<p>Click the begins with for Last Name dropdown list.</p> <p>Last Name: <input type="text"/> begins with ▼</p>
5.	<p>Here is a complete list of Operators for use in searching a field; not all operators are appropriate for all types of fields.</p> <p>begins with: search a text field using a string of alpha and/or numeric characters; the system finds values that match the string at the beginning of the field.</p> <p>contains: search a text field using a string of alpha and/or numeric characters; the system finds values that match the string as long as the field contains the string of characters, anywhere in the field.</p>
6.	<p>= (Equals): search any field for an exact match using a string of characters; the system finds values that exactly match the string of characters.</p> <p>not = (not equal to): search any field using a string of characters; the system finds values that do NOT exactly match the string of characters.</p>
7.	<p>< (less than): search any field using a string of characters; the system finds values that are less than the string of characters.</p> <p><= (less than or equal to): search any field using a string of characters; the system finds values that are less than or equal to the string of characters.</p> <p>> (greater than): search any field using a string of characters; the system finds values that are greater than the string of characters.</p> <p>>= (greater than or equal to): search any field using a string of characters; the system finds values that are greater than or equal to the string of characters.</p>

Step	Action
8.	<p>between: when choosing between, the system opens two criteria fields; enter a minimum value in the first field, and a maximum value in the second field; search any field using a string of characters; the system finds values that are between the search criteria strings.</p> <p>in: when choosing in, the system allows you to enter a comma separated list of values; search any field using a string of characters; input multiple comma separated strings; the system finds values that are in your list.</p>
9.	<p>The last name contains the letters "rp".</p> <p>Click the contains list item.</p> <p>contains</p>
10.	<p>Enter the desired information into the Last Name contains field. Enter "rp".</p> <p>Last Name: <input type="text" value="contains"/> <input type="text" value="rp"/></p>
11.	<p>The search criteria are:</p> <p>Empl ID begins with '0' Name begins with 'test' Last Name contains 'rp'</p> <p>Click the Search button to find the record(s) that match these values.</p> <p><input type="button" value="Search"/></p>
12.	<p>Nine records are displayed in the Search Results grid matching these search criteria.</p>
13.	<p>If the search criteria is for a search that might be used again, save the search.</p> <p>Click the Save Search Criteria link.</p> <p><input type="button" value="Save Search Criteria"/></p>
14.	<p>The system displays the Save Search As page. Note that this page lists the criteria that will be saved for this search.</p> <p>Give the search a meaningful name.</p> <p>Enter the desired information into the Name of Search: field.</p> <p>Enter "Personal Info 0 TEST RP".</p> <p>Name of Search: <input type="text" value="Personal Info 0 TEST RP"/></p>

Step	Action
15.	Click the Save button. 
16.	The system will confirm that it saved your search. Click the Return to Advanced Search link. 
17.	A Use Saved Search field appears just under the Search Criteria header; a saved search can be selected from this drop-down list. Once a search has been saved, that specific search record is available for use in this page (as well as other search pages as long as they use the same search record).
18.	Any saved search can be deleted by first selecting it in the Use Saved Search field, and then clicking on the Delete Saved Search link.
19.	To clear all fields of any search criteria, click the Clear button. Click the Clear button. 
20.	In addition to operators , searching in CAPPS HR/Payroll supports wildcards. Two wildcard characters can help you find information by "standing for" one or more characters in your search string. % (Percent Sign) matches one or more characters. _ (Underscore) matches any single character Wildcard characters can only be used in text fields, and will only work with the first two operators: begins with and contains .
21.	For example, using the underscore character, search fr this string: "st_ve" and the system might find the values: Steve stove

Step	Action
22.	<p>To use the percent sign character, search for this string:</p> <p>"st%"</p> <p>and the system might find the values:</p> <p>Steve stove Stephanie ST</p> <p>Notice that the last value ST, is found because the % character can also mean "no characters".</p>
23.	<p>In looking up Personal Information for an employee you know that the Empl ID begins with '0' and also contains '99' but the intervening digits are not known.</p> <p>Enter the desired information into the Empl ID field. Enter "0%99".</p> <p>Empl ID: begins with ▼ <input type="text" value=""/></p>
24.	<p>Click the Search button.</p> <p><input type="button" value="Search"/></p>
25.	<p>The system finds three rows of data:</p> <p>Empl ID 0000000099 and Empl ID 00000000199 and Empl ID 00000000299.</p> <p>The system retrieved 3 rows into the Search Results grid, because each begins with '0' and each contains the characters '99' somewhere after the initial 0.</p>
26.	<p>Click the Clear button.</p> <p><input type="button" value="Clear"/></p>
27.	<p>While the percent sign matches one or more characters, the underscore wildcard matches a single character only.</p> <p>Enter the desired information into the Empl ID field. Enter "0_99".</p> <p>Empl ID: begins with ▼ <input type="text" value=""/></p>

Step	Action
28.	Click the Search button. 
29.	The search looked for an Empl ID where the four-digit value begins with '0', has any character in the second position and ends with '99'. The system returns the message "No matching values were found,"
30.	Click the Clear button. 
31.	Enter the desired information into the Empl ID field. Enter " 00000002_1 ". <input data-bbox="440 842 719 877" type="text"/>
32.	Click the Search button. 
33.	The system found six rows of data. 0000000201 0000000211 0000000211 (it found this value twice, because this Empl ID exists in two separate Business Units) 0000000221 0000000251 0000000261 In all cases, there is a single digit between '00000002 and 1 in the Empl ID.
34.	Congratulations! You have successfully completed this lesson. End of Procedure.

Section 1 - Timesheet

Section 1 - Timesheet

Section 1 - Timesheet has 5 lessons:

- Lesson 1 - Time Reporting Overview
- Lesson 2 - Time Reporting Essentials
- Lesson 3 - Entering Time and Leave

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- Lesson 4 - Timesheet Status
- Lesson 5 - View Time and Leave Balances

Lesson 3 - Entering Time and Leave

Section 1, Lesson 3

Entering Time and Leave

Timesheet Components

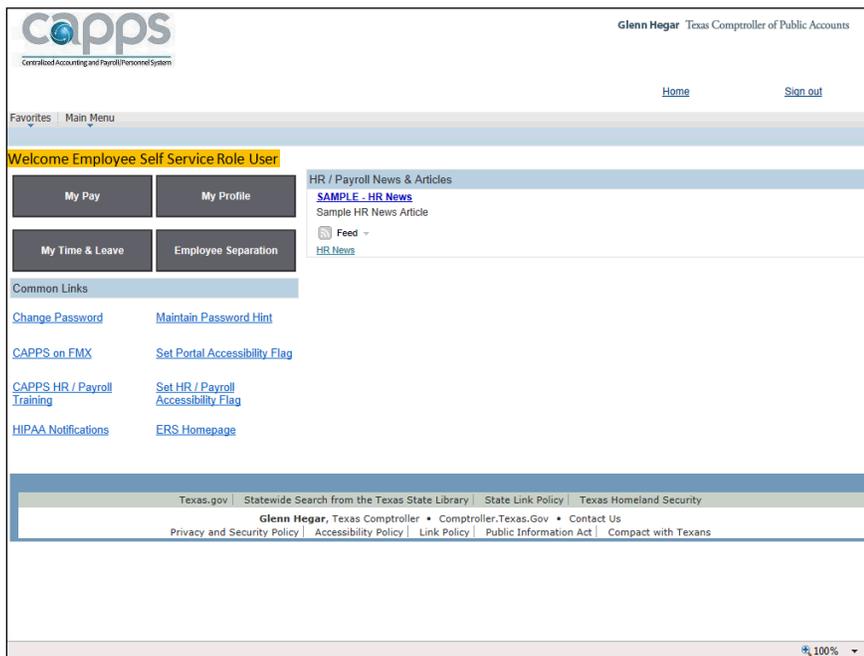
Section 1 - Lesson 3 Exercises - Scenario 1: Timesheet Components

Note: Contingent Workers

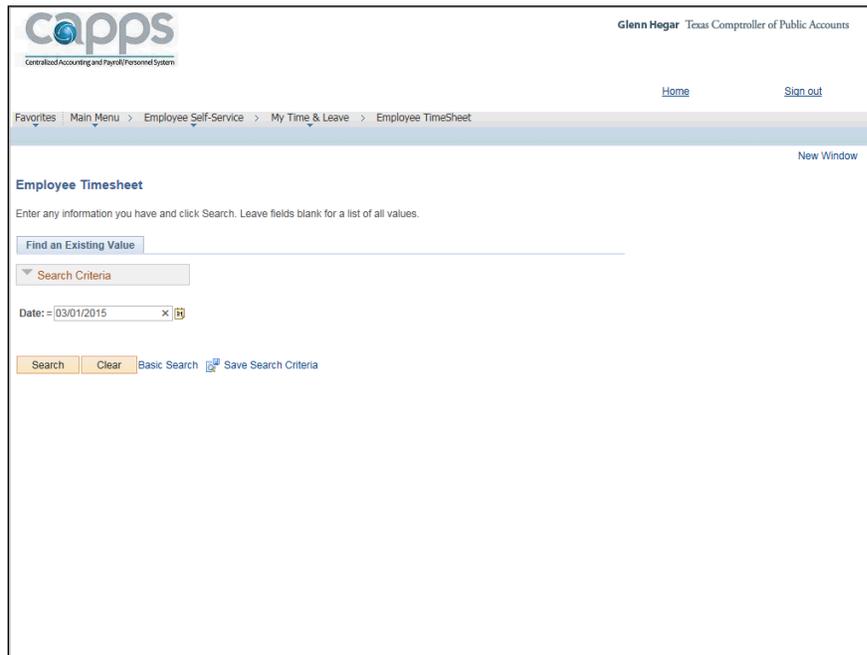
Time Reporter Data is not automatically setup for Contingent Workers, therefore you will not have immediate access to the Employee Timesheet. If an agency wants you to have access to the Employee Timesheet then the agency will have to submit an ASP ticket so CPA can set up your Time Reporter Data.

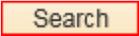
Procedure

In this lesson you will be introduced to the various components on the timesheet and when they are used.



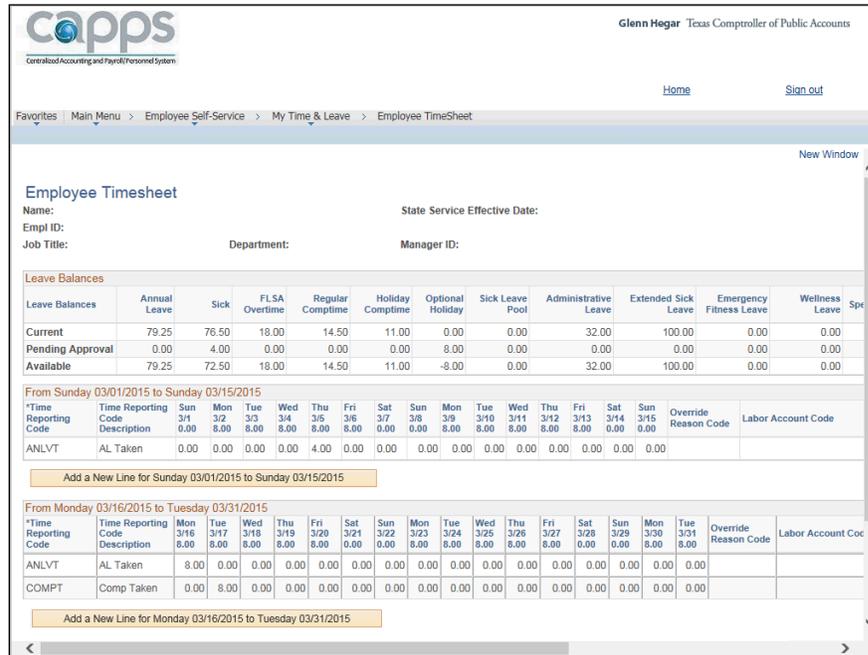
Step	Action
1.	Click the My Time & Leave button. 
2.	Click the Employee TimeSheet link. 
3.	The Employee Timesheet search page will automatically open. It is important to note, the Timesheet displays 31 days starting from the date you enter on the Employee Timesheet search page. The Timesheet defaults to the first day of the current month. For this reason it is recommended that you always search by the first day of the month . As a result, the Timesheet will then display one month in its entirety.



Step	Action
4.	Click the Search button. 

Step	Action
5.	<p>NOTE: For security and privacy purposes, confidential data has been removed from this training. However, in CAPPS employee's specific information will appear on their individual timesheet.</p> <p>Other data contained in this training is fictitious and used for training purposes only.</p>
6.	<p>The top portion of the Timesheet contains the employee's Leave Balance information.</p> <p>Current - Balance including pending approval Pending Approval - Hours requested to be used, but not approved Available - Current balance minus anything that is pending approval</p> <p>For example, in the illustration above: The current Sick Leave hours accrued is 76.50. Four (4) hours are pending approval. The available hours after the pending hours are subtracted is 72.50.</p> <p>Note: Leave accruals are added to your current balance on the first work day of the month.</p> <p>The order in which leave plans (also known as comp time plans) appear on your timesheet is dependent upon your agency, therefore your timesheet may display differently.</p>
7.	<p>The center of the Timesheet displays the 31 day period that you selected on the search page.</p> <p>For example, on the search page, you entered 03/01/2015. Therefore the top grid displays 03/01/2015 through 03/15/2015. The bottom grid displays 3/16/2015 through 03/31/2015.</p>
8.	<p>The assigned work schedule will appear on the Timesheet for an Exception Time Reporter as illustrated on the screen.</p> <p>Earlier in the lesson, you learned that Positive Time Reporters will not have a schedule on the Timesheet.</p>
9.	<p>You will use Time Reporting Codes (TRCs) to report what type of time is being entered on the Timesheet.</p> <p>In this example, the TRC "ANLVT" is being used to reflect (4) hours of Annual Leave Taken on Thursday, March 5, 2015 and (8) hours on March 16, 2015.</p>

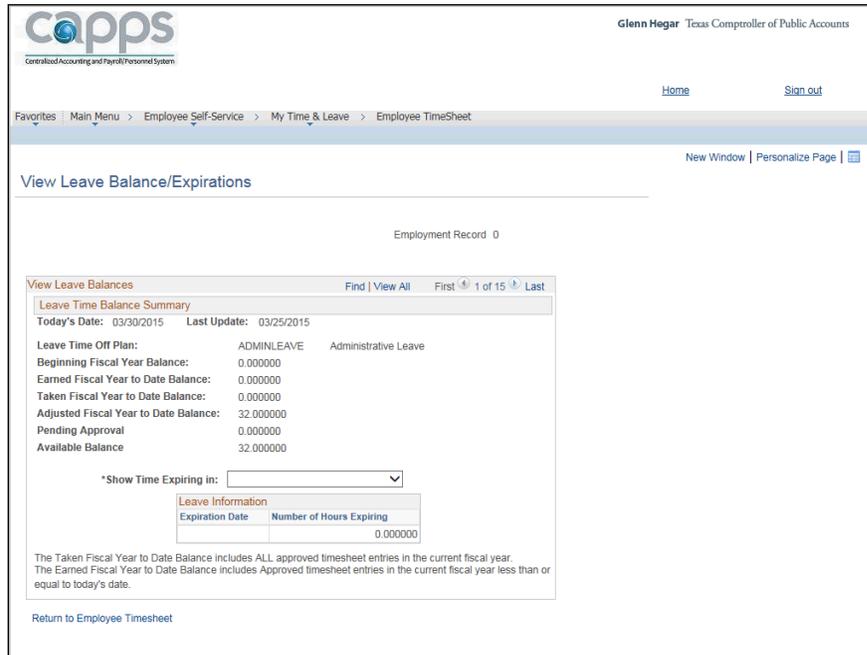
Step	Action
10.	To add additional time to the Timesheet, click the "Add a New line for ..." button. Notice how an additional line is displayed on the Timesheet.



The screenshot shows the CAPPS Employee Timesheet interface. At the top, it displays the CAPPS logo and the user's name, Glenn Hegar, Texas Comptroller of Public Accounts. Below the logo, there are navigation links for Home and Sign out. The main content area is titled "Employee Timesheet" and includes fields for Name, Empl ID, Job Title, Department, and Manager ID. A "State Service Effective Date:" field is also present. Below these fields, there is a "Leave Balances" table with columns for Annual Leave, Sick, FLSA Overtime, Regular Comptime, Holiday Comptime, Optional Holiday, Sick Leave Pool, Administrative Leave, Extended Sick Leave, Emergency Fitness Leave, Wellness Leave, and Sp. The table shows current, pending approval, and available balances for each category. Below the leave balances, there are two time reporting tables. The first table is for the period "From Sunday 03/01/2015 to Sunday 03/15/2015" and the second is for "From Monday 03/16/2015 to Tuesday 03/31/2015". Each table has columns for Time Reporting Code, Time Reporting Description, and days of the week (Sun through Tue). The first table shows an entry for "ANLVT" (AL Taken) on Sunday 03/01/2015. The second table shows an entry for "ANLVT" (AL Taken) on Monday 03/16/2015 and "COMPT" (Comp Taken) on Tuesday 03/17/2015. Below each table, there is a button labeled "Add a New Line for [Period]".

Step	Action
11.	Click the bottom scrollbar to navigate across the page.
12.	You should use the Override Reason Code <u>only</u> when your manager asks you to enter a value. It is generally used by agencies to track time being allocated for a specific purpose, such as Military or Disaster.
13.	The Labor Account Code (LAC) field is used to track time allocated to a specific project. Employees should consult with their manager before entering a specific LAC.
14.	The Family Medical Leave Act (FMLA) field is used to track time allocated to FMLA leave. It is only used when an employee is on FMLA leave. Employees on FMLA should contact their Agency FMLA representative to obtain the FMLA number to be used in this field.

Step	Action
15.	<p>The Comments field is available for use by both the employees and managers can enter information, as needed.</p> <p>It is important to note that both the employee and their manager can read the contents in the comment field.</p>
16.	<p>The Delete button will remove the entire row of time.</p> <p>However, once the employee selects the E-Sign & Submit button, the delete button will no longer be available.</p> <p>Click the bottom scrollbar to navigate back across the page.</p>
17.	Click on the scroll bar to navigate to the bottom of the page.
18.	The Previous button will display the previous month (31 days).
19.	The Next button will display the next month (31 days).
20.	<p>The View Leave Balances link will provide detailed information for all the employees leave plans also known as comp time plans.</p> <p>Click the View Leave Balances link.</p> <p>View Leave Balances</p>
21.	<p>The Leave Time Balance Summary page will appear.</p> <p>This screen is displaying the details for ONLY one leave plan, (ADMINLEAVE) or Administrative Leave.</p> <p>To view additional leave plan details use the Show Next in Row arrow. This page is currently displaying 1 of 15 (one record of 15 total records.)</p>



Glenn Hegar Texas Comptroller of Public Accounts

Home Sign out

Favorites Main Menu > Employee Self-Service > My Time & Leave > Employee TimeSheet

New Window | Personalize Page

View Leave Balance/Expirations

Employment Record 0

View Leave Balances Find | View All First 1 of 15 Last

Leave Time Balance Summary
 Today's Date: 03/30/2015 Last Update: 03/25/2015

Leave Time Off Plan: ADMINLEAVE Administrative Leave

Beginning Fiscal Year Balance: 0.000000
 Earned Fiscal Year to Date Balance: 0.000000
 Taken Fiscal Year to Date Balance: 0.000000
 Adjusted Fiscal Year to Date Balance: 32.000000
 Pending Approval: 0.000000
 Available Balance: 32.000000

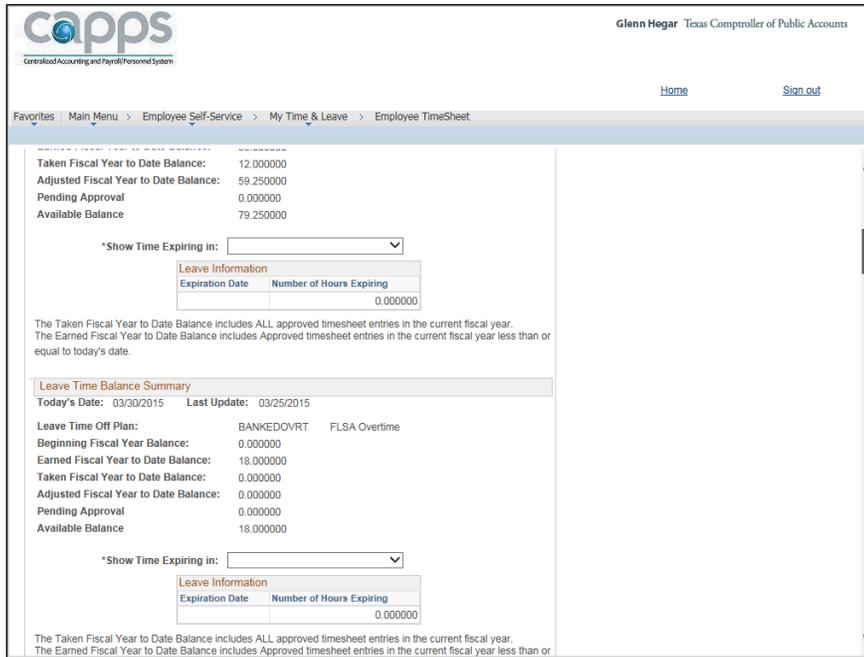
*Show Time Expiring in: [dropdown]

Leave Information	
Expiration Date	Number of Hours Expiring
	0.000000

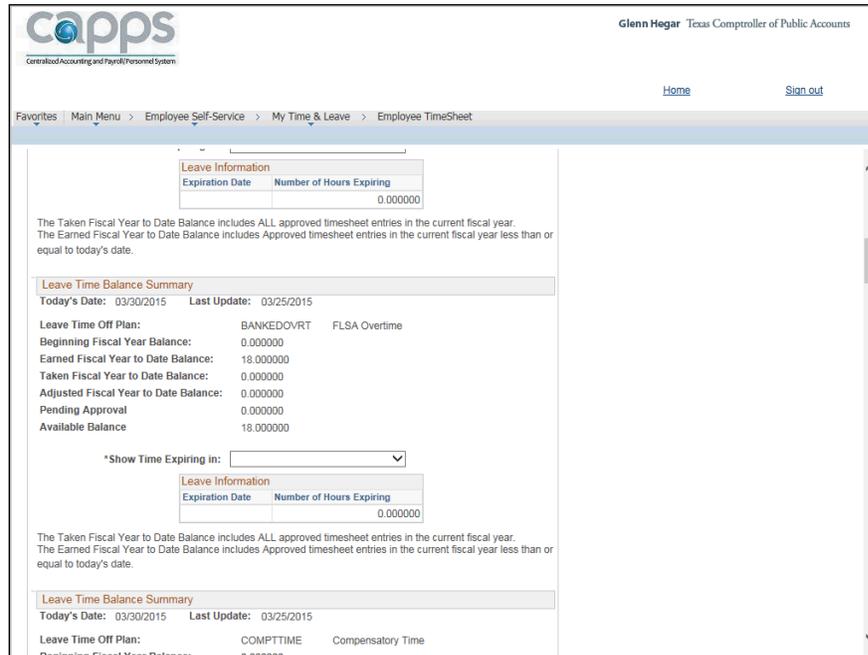
The Taken Fiscal Year to Date Balance includes ALL approved timesheet entries in the current fiscal year.
 The Earned Fiscal Year to Date Balance includes Approved timesheet entries in the current fiscal year less than or equal to today's date.

[Return to Employee Timesheet](#)

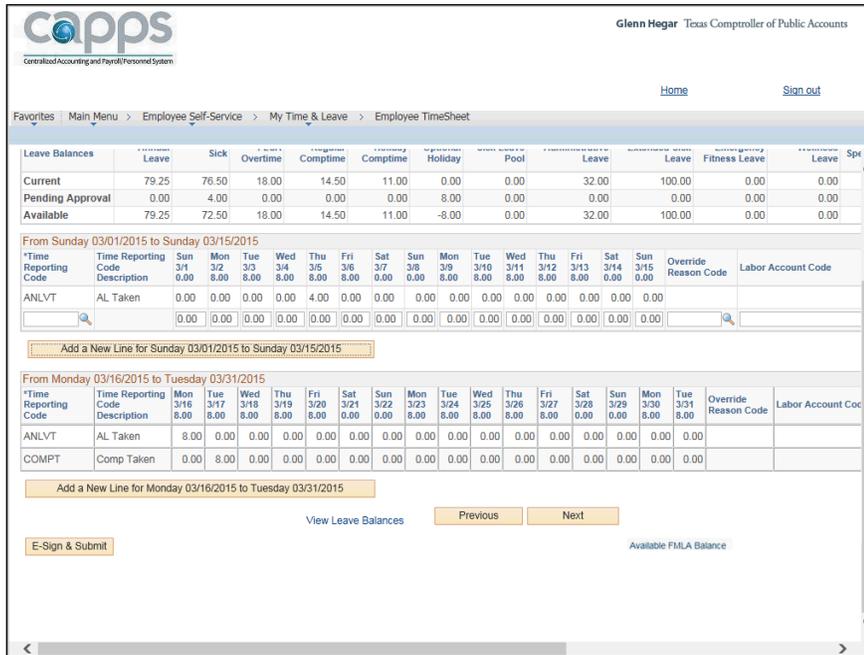
Step	Action
22.	Click the Show next row button. 
23.	Notice how the display changed to 2 of 15. The system is displaying the second record of the total fifteen records.
24.	Click the Show Time Expiring in list. 
25.	You can select any of the options to view expiring leave time.
26.	Click the View All link. 
27.	Click the scrollbar to navigate down the page. 



Step	Action
28.	Click the scrollbar to continue to navigate down the page. 
29.	Using the View All link will display all the leave plans vertically. This allows you to navigate up or down to view all of your leave balance details.



Step	Action
30.	Click the scrollbar to navigate back to the top of the page. 
31.	Click the View 1 link to go back to viewing only one leave plan. 
32.	Click the Return to Employee Timesheet link. 



The screenshot shows the CAPPS Employee TimeSheet interface. At the top, it displays the user's name 'Glenn Hegar' and title 'Texas Comptroller of Public Accounts'. Below this are navigation links for 'Home' and 'Sign out'. The main content area is titled 'Employee TimeSheet' and contains several sections:

- Leave Balances:** A table showing current, pending approval, and available balances for various leave types like Leave, Sick, Overtime, Comptime, Holiday, Pool, Fitness Leave, and Leave Spr.
- Time Reporting:** Two tables for reporting time for specific date ranges: 'From Sunday 03/01/2015 to Sunday 03/15/2015' and 'From Monday 03/16/2015 to Tuesday 03/31/2015'. Each table has columns for days of the week and time reporting codes (ANLVT, COMPT).
- Navigation:** Buttons for 'View Leave Balances', 'Previous', 'Next', and 'E-Sign & Submit'.

Step	Action
33.	<p>The Available FMLA Balance link will only be available when it is applicable to an employee on FMLA.</p> <p>Otherwise employees will not see this link.</p> <p>Click the Available FMLA Balance link.</p> <p>Available FMLA Balance</p>
34.	<p>The FLMA Open Events screen only displays OPEN EVENTS. It displays the FMLA Request ID and the Date Range.</p>
35.	<p>The Available Balance section displays the balance for FMLA and Military Caregiver (MCL).</p>
36.	<p>Click the Return link to go back to the Timesheet.</p> <p>Return</p>
37.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Positive Time Reporters

Section 1, Lesson 3

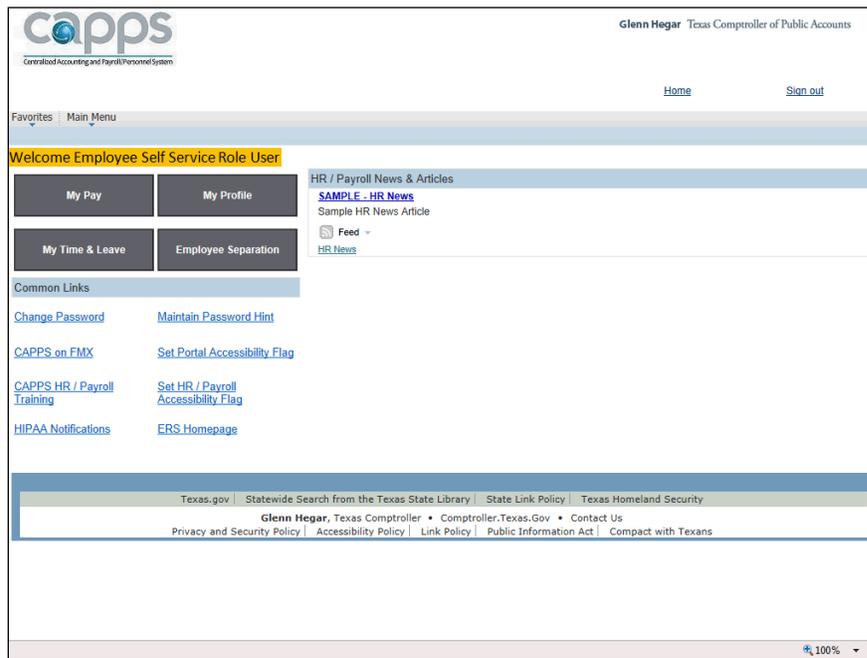
Positive Time Reporters

Enter Regular Hours Worked - Positive Time Reporter

Section 1 - Lesson 3 Positive Time Reporters Exercises - Scenario 2: Enter Regular Hours Worked

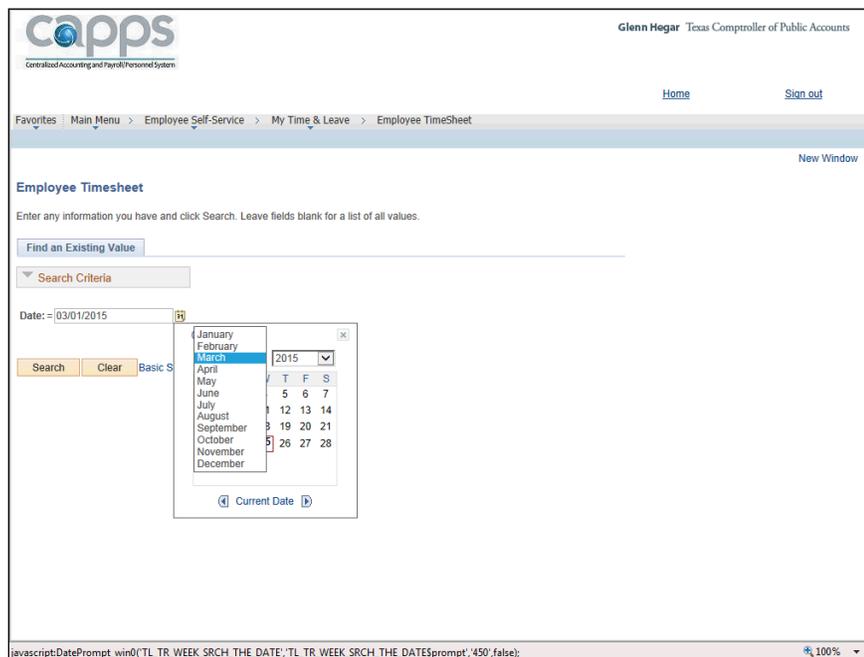
Procedure

In this lesson you will learn how to enter hours worked as a Positive Time Reporter.



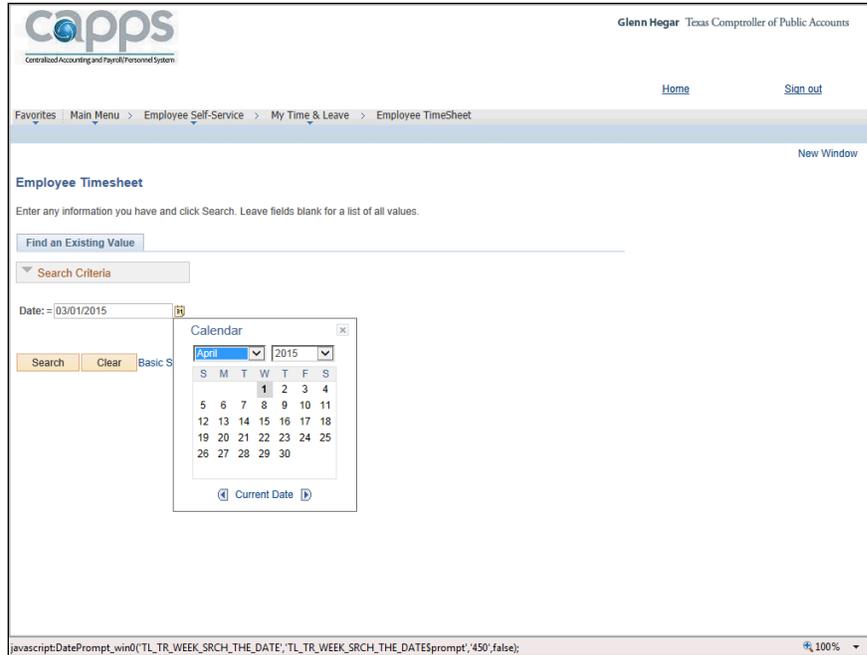
Step	Action
1.	Click the My Time & Leave button. 
2.	Click the Employee TimeSheet link. 

Step	Action
3.	<p>The Employee Timesheet search page will automatically open.</p> <p>It is important to note, the Timesheet displays 31 days starting from the date you enter on the Employee Timesheet search page. The Timesheet defaults to the first of the current month.</p> <p>For this reason it is recommended that you always search by the first day of the month. As a result, the Timesheet will then display one month in its entirety.</p>
4.	<p>Use the Calendar icon to change the date to the applicable month.</p> <p>In this example you will be changing the date to April 1, 2015.</p> <p>Click the Calendar icon.</p>
5.	<p>Click the dropdown arrow to the month.</p> 



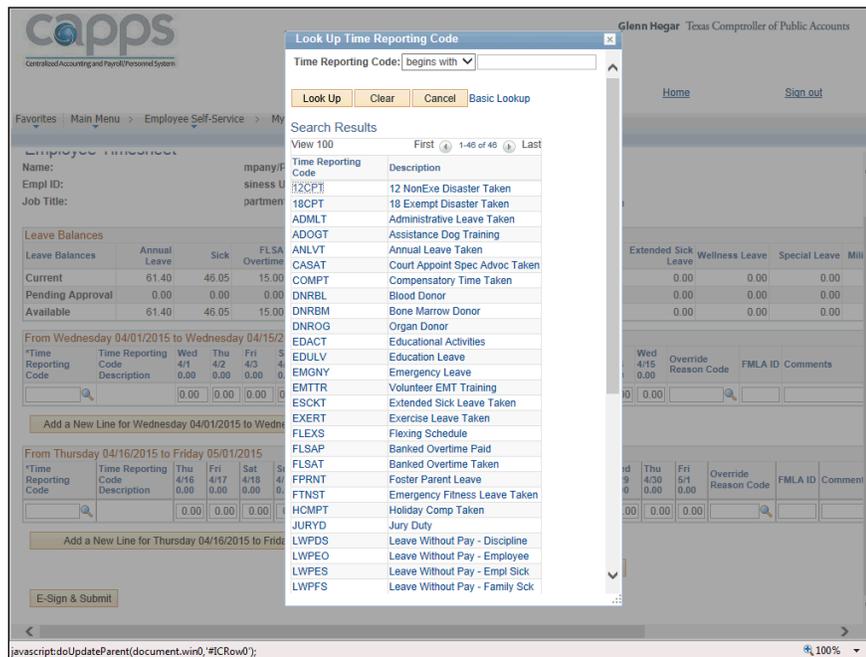
The screenshot displays the CAPPS Employee Timesheet search interface. At the top, the CAPPS logo and 'Glenn Hegar Texas Comptroller of Public Accounts' are visible. The breadcrumb trail indicates the user is in 'Employee Self-Service > My Time & Leave > Employee TimeSheet'. The main heading is 'Employee Timesheet'. Below this, there is a search criteria dropdown menu set to 'Date'. The date input field shows '-03/01/2015'. A calendar popup is open, showing the month of April for the year 2015. The date '1' is selected in the calendar. The page also includes a 'Search' button and a 'Clear' button. The status bar at the bottom shows a JavaScript error message and a 100% zoom level.

Step	Action
6.	Click April from the list. April

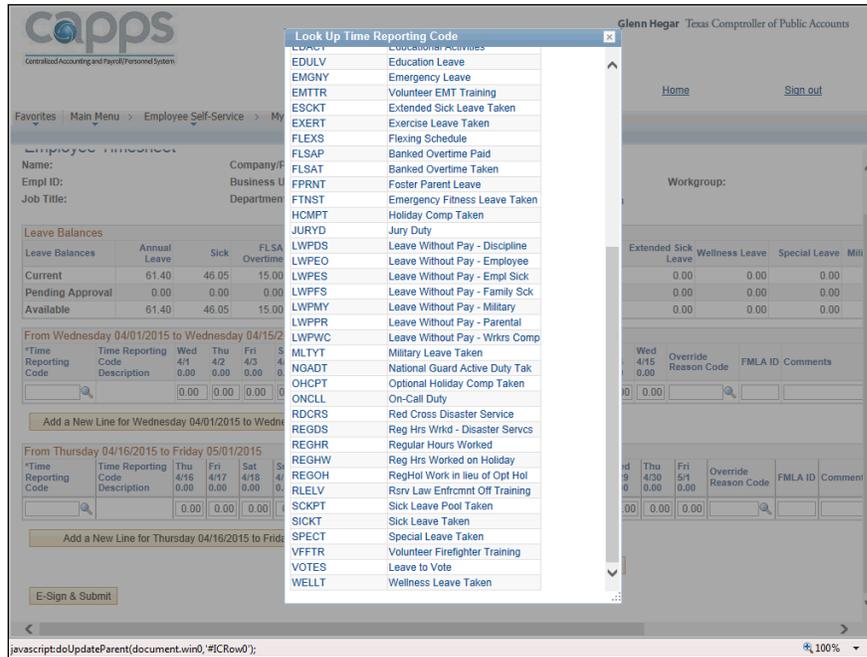


Step	Action
7.	Click the first day of the month. Click on the " 1 " link. 1
8.	Click the Search button. Search
9.	The Positive Time Reporter's timesheet automatically displays. The timesheet has no scheduled hours displayed. The description line displays 0.00, as illustrated above. Positive Time Reporters must enter all of their time worked, or leave time taken. If time worked or leave time taken is NOT entered the employee will not receive a paycheck.

Step	Action
10.	<p>Entering time for a Positive Time Reporter is a three-step process.</p> <ol style="list-style-type: none"> 1. Select the applicable Time Report Code (TRC). 2. Enter the hours worked or leave time taken. 3. Select the E-Sign & Submit button.
11.	<p>Step 1 - Select the applicable Time Report Code (TRC).</p> <p>Since you are entering time for Regular Hours Worked you will use the TRC - REGHR. The TRC may be entered directly or by selecting the Look up button.</p> <p>Start by clicking the Look up Time Reporting Code button.</p> 



Step	Action
12.	Click the scrollbar to navigate down the list.



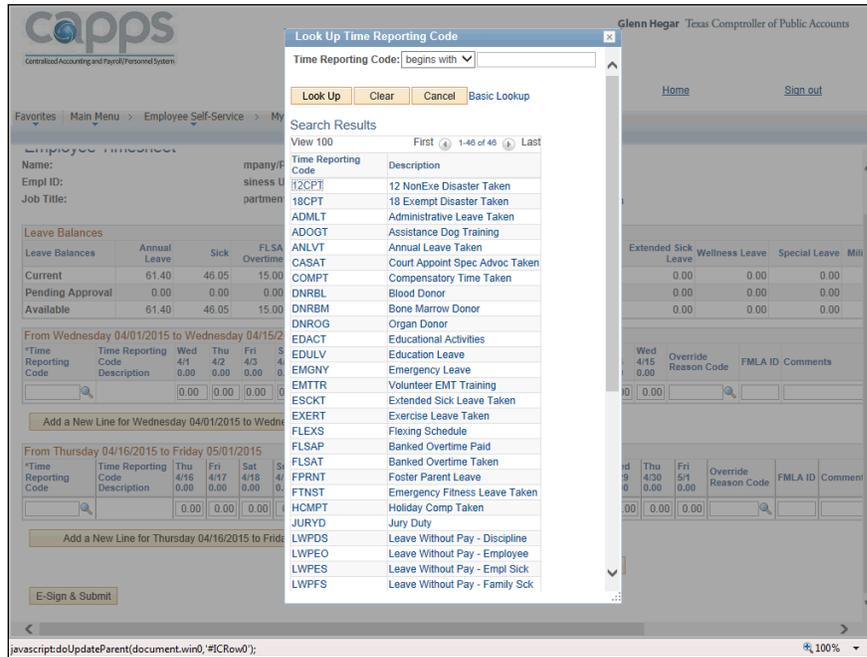
Step	Action
13.	Select the TRC for Regular Hours Worked. Click the REGHR link. REGHR
14.	Step 2 - Enter the hours worked or leave time taken. In this example you will enter (8) hours worked on Wednesday, 4/1. Enter "8" in the Wed 4/1 field. 0.00
15.	Enter "8" in the Thu 4/2 field. 0.00
16.	Enter "8" in the Fri 4/3 field. 0.00
17.	Enter "8" in the Mon 4/6 field. 0.00
18.	Enter "8" in the Tue 4/7 field. 0.00

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Step	Action
19.	Enter "8" in the Wed 4/8 field. 
20.	Enter "8" in the Thu 4/9 field. 
21.	Enter "8" in the Fri 4/10 field. 
22.	Enter "8" in the Mon 4/13 field. 
23.	Enter "8" in the Tue 4/14 field. 
24.	Enter "8" in the Wed 4/15 field. 
25.	<p>You will enter hours worked for the second half of the month by using the REGHR TRC again.</p> <p>You can either type it in the field or select the Look up Time Reporting Code button.</p> 



Look Up Time Reporting Code

Time Reporting Code: begins with

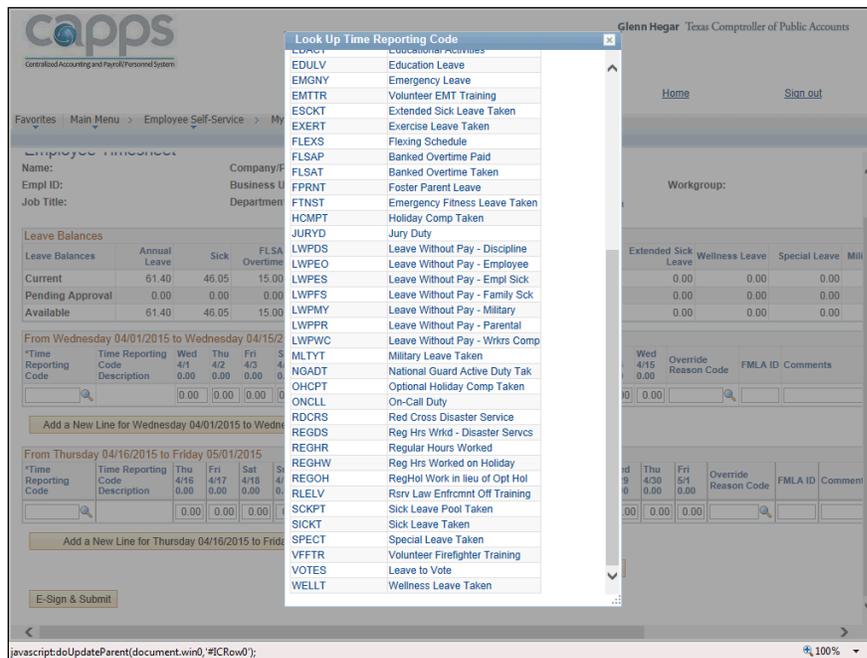
Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-46 of 46 Last

Time Reporting Code	Description
12CPT	12 NonExe Disaster Taken
18CPT	18 Exempt Disaster Taken
ADMLT	Administrative Leave Taken
ADOGT	Assistance Dog Training
ANLVT	Annual Leave Taken
CASAT	Court Appoint Spec Advoc Taken
COMPT	Compensatory Time Taken
DNRBL	Blood Donor
DNRBM	Bone Marrow Donor
DNROG	Organ Donor
EDACT	Educational Activities
EDULV	Education Leave
EMGNY	Emergency Leave
EMTTR	Volunteer EMT Training
ESCKT	Extended Sick Leave Taken
EXERT	Exercise Leave Taken
FLEXS	Flexing Schedule
FLSAP	Banked Overtime Paid
FLSAT	Banked Overtime Taken
FPRNT	Foster Parent Leave
FTNST	Emergency Fitness Leave Taken
HCMPY	Holiday Comp Taken
JURYD	Jury Duty
LWPSD	Leave Without Pay - Discipline
LWPEO	Leave Without Pay - Employee
LWFES	Leave Without Pay - Empl Sick
LWFFS	Leave Without Pay - Family Sck

Step	Action
26.	Click the scrollbar to navigate down the list.



Look Up Time Reporting Code

Time Reporting Code: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-46 of 46 Last

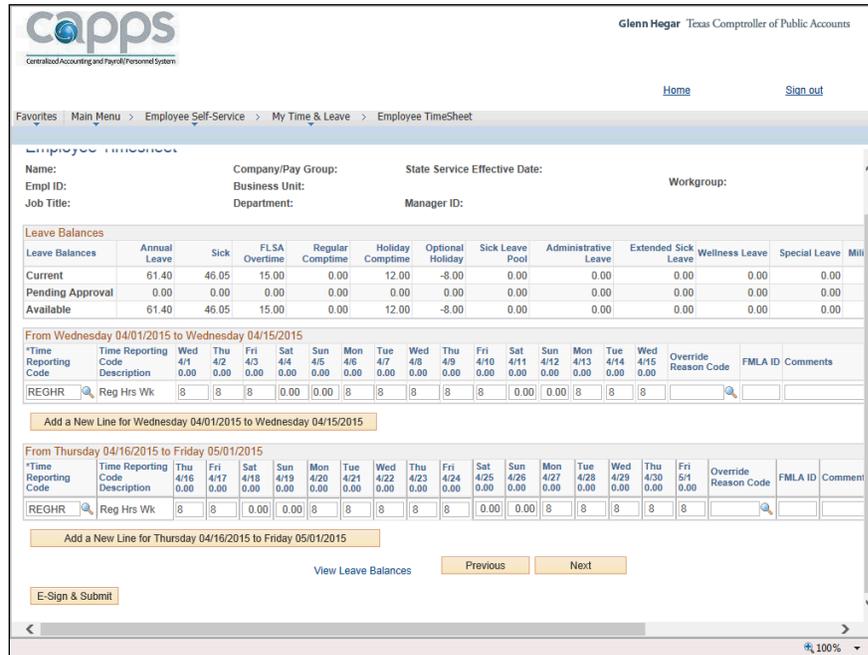
Time Reporting Code	Description
EDULV	Education Leave
EMGNY	Emergency Leave
EMTTR	Volunteer EMT Training
ESCKT	Extended Sick Leave Taken
EXERT	Exercise Leave Taken
FLEXS	Flexing Schedule
FLSAP	Banked Overtime Paid
FLSAT	Banked Overtime Taken
FPRNT	Foster Parent Leave
FTNST	Emergency Fitness Leave Taken
HCMPY	Holiday Comp Taken
JURYD	Jury Duty
LWPSD	Leave Without Pay - Discipline
LWPEO	Leave Without Pay - Employee
LWFES	Leave Without Pay - Empl Sick
LWFFS	Leave Without Pay - Family Sck
LWPPR	Leave Without Pay - Parental
LWPWC	Leave Without Pay - Wrksr Comp
MLTYT	Military Leave Taken
NGADT	National Guard Active Duty Tak
OHCTP	Optional Holiday Comp Taken
ONCLL	On-Call Duty
RDCRS	Red Cross Disaster Service
REGDS	Reg Hrs Wrkd - Disaster Servcs
REGHR	Regular Hours Worked
REGHW	Reg Hrs Worked on Holiday
REGHO	RegHol Work in lieu of Opt Hol
RLELV	Rsrsv Law Enfrmnt Off Training
SCKPT	Sick Leave Pool Taken
SICKT	Sick Leave Taken
SPECT	Special Leave Taken
VFFTR	Volunteer Firefighter Training
VOTES	Leave to Vote
WELLT	Wellness Leave Taken

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Step	Action
27.	Select the TRC for Regular Hours Worked. Click the REGHR link. REGHR
28.	Enter "8" in the Thu 4/16 field. <input type="text" value="0.00"/>
29.	Enter "8" in the Fri 4/17 field. <input type="text" value="0.00"/>
30.	Enter "8" in the Mon 4/20 field. <input type="text" value="0.00"/>
31.	Enter "8" in the Tue 4/21 field. <input type="text" value="0.00"/>
32.	Enter "8" in the Wed 4/22 field. <input type="text" value="0.00"/>
33.	Enter "8" in the Thu 4/23 field. <input type="text" value="0.00"/>
34.	Enter "8" in the Fri 4/24 field. <input type="text" value="0.00"/>
35.	Enter "8" in the Mon 4/27 field. <input type="text" value="0.00"/>
36.	Enter "8" in the Tue 4/28 field. <input type="text" value="0.00"/>
37.	Enter "8" in the Wed 4/29 field. <input type="text" value="0.00"/>
38.	Enter "8" in the Thu 4/30 field. <input type="text" value="0.00"/>
39.	Enter "8" in the Fri 5/1 field. <input type="text" value="0.00"/>



Step	Action
40.	<p>Step 3 - Select the E-Sign & Submit button.</p> <p>When you have completed entering your time on the timesheet, click the E-Sign & Submit button. This will send your timesheet to your manager for approval.</p> <p>E-Sign & Submit</p>
41.	<p>Congratulations! You have completed the lesson.</p> <p>End of Procedure.</p>

Enter Time Over 40 hours - Positive Time Reporter

Section 1 - Lesson 3 Positive Time Reporters Exercises - Scenario 3: Enter Time Over 40 Hours

Procedure

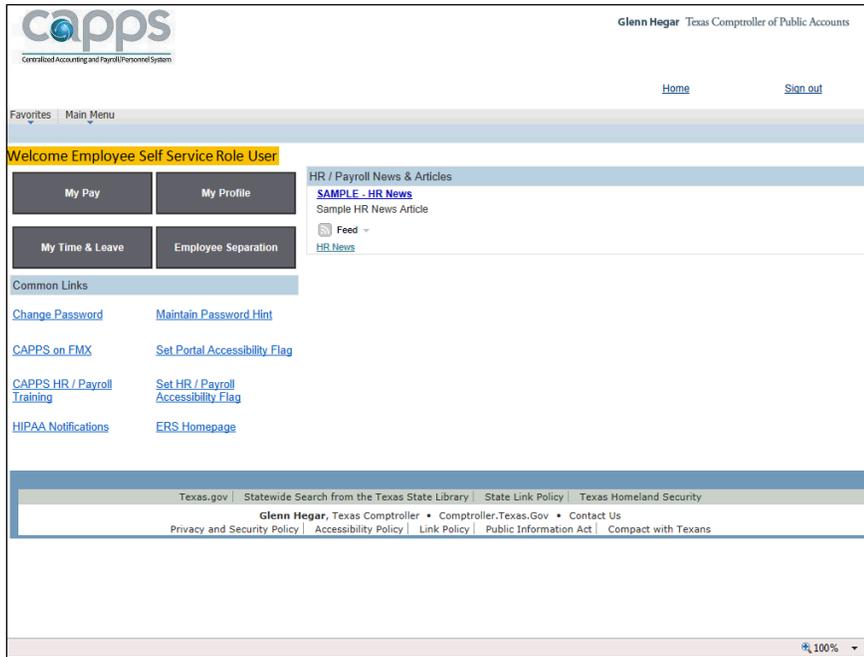
In this lesson you will learn how to enter time over 40 hours in a work week for a positive time reporter.

In this example, a Positive Time Reporter will enter all the hours he/she worked during the week of 4/6-4/10. He/she generally works Monday - Friday, eight hours per day. On Tuesday and Wednesday, he/she worked two hours of overtime.

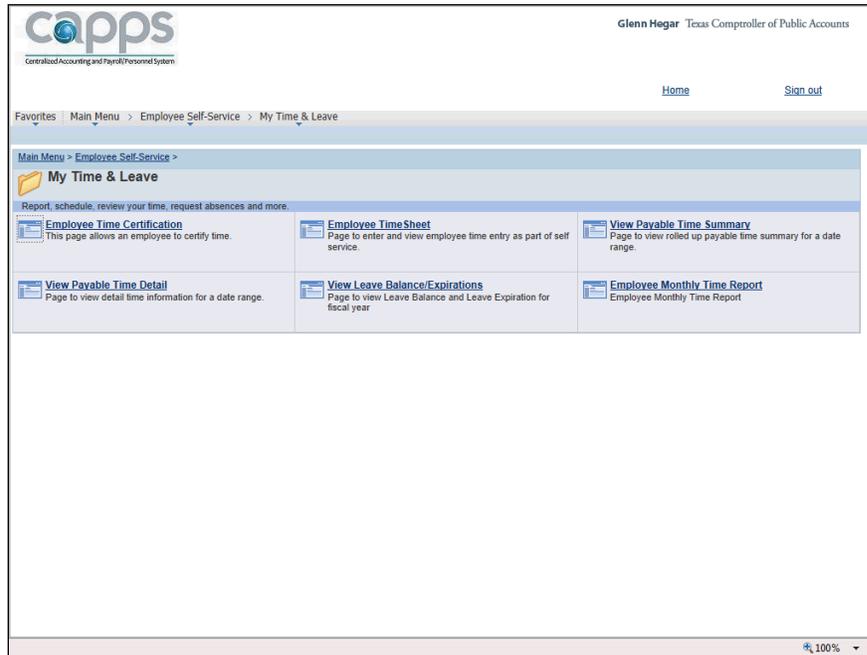
Note: This is a non-exempt employee who banks FLSA overtime for hours worked over 40.

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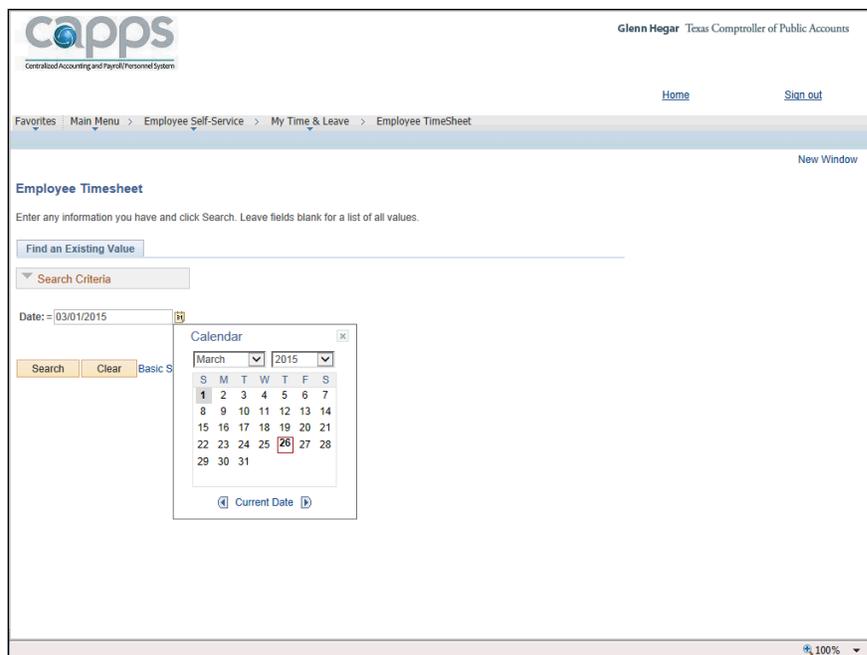
Step	Action
1.	Click the My Time & Leave button. <div data-bbox="344 1102 673 1201" style="border: 2px solid red; padding: 5px; text-align: center; margin: 10px 0;"> My Time & Leave </div>



The screenshot shows the 'My Time & Leave' section of the CAPPS interface. It includes a breadcrumb trail: 'Main Menu > Employee Self-Service > My Time & Leave'. Below this, there is a sub-menu 'Main Menu > Employee Self-Service > My Time & Leave' with a 'Report, schedule, review your time, request absences and more.' icon. A grid of six links is displayed:

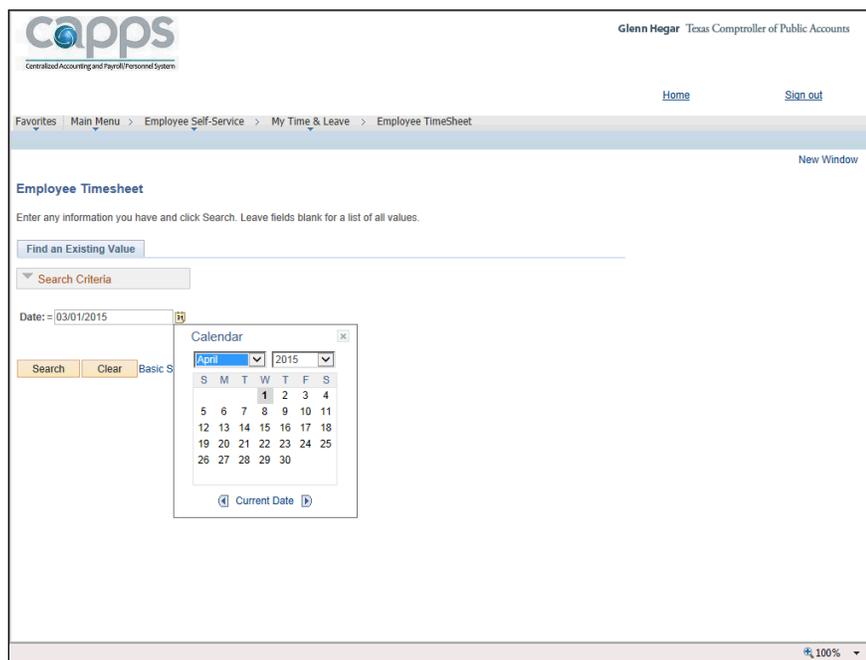
- Employee Time Certification**: This page allows an employee to certify time.
- Employee TimeSheet**: Page to enter and view employee time entry as part of self service.
- View Payable Time Summary**: Page to view rolled up payable time summary for a date range.
- View Payable Time Detail**: Page to view detail time information for a date range.
- View Leave Balance/Expirations**: Page to view Leave Balance and Leave Expiration for fiscal year.
- Employee Monthly Time Report**: Employee Monthly Time Report.

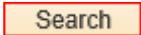
Step	Action
2.	Click the Employee TimeSheet link. Employee Time Shee

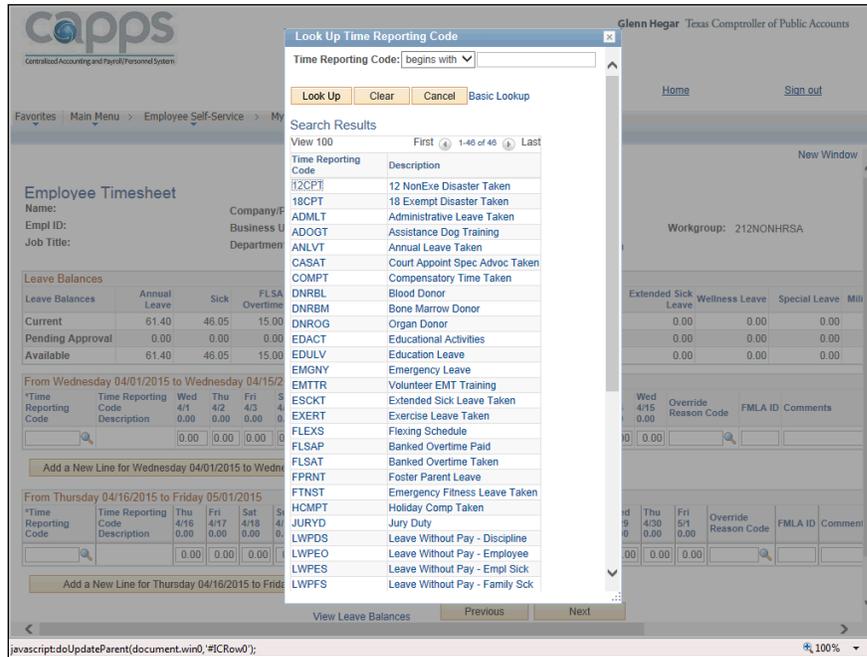


The screenshot shows the 'Employee Timesheet' page. It features a search bar with the text 'Find an Existing Value'. Below the search bar is a 'Search Criteria' dropdown menu. A date field is set to '03/01/2015'. A 'Calendar' pop-up window is open, showing the month of March 2015. The calendar grid has the following dates: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31. The date 28 is highlighted with a red box. At the bottom of the calendar, there is a 'Current Date' button.

Step	Action
3.	Click the button to the right of the field. 
4.	Click April from the menu. 

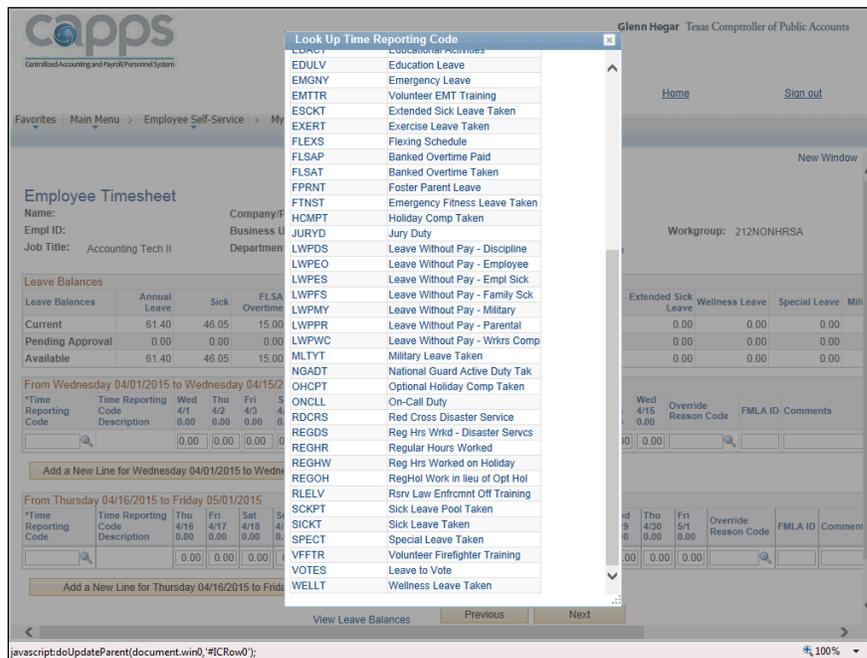


Step	Action
5.	Click the '1' link for the first of the month. 
6.	Click the Search button. 
7.	Click the Look up Time Reporting Code (Alt+5) button. 



The screenshot shows the CAPPS Employee Timesheet interface. A modal window titled "Look Up Time Reporting Code" is open, displaying a search for codes that "begins with" "12". The search results list various time reporting codes and their descriptions, such as "12CPT 12 NonExe Disaster Taken", "18CPT 18 Exempt Disaster Taken", "ADMLT Administrative Leave Taken", "ADOGT Assistance Dog Training", "ANLVT Annual Leave Taken", "CASAT Court Appoint Spec Advoc Taken", "COMPT Compensatory Time Taken", "DNRBL Blood Donor", "DNRBM Bone Marrow Donor", "DNROG Organ Donor", "EDACT Educational Activities", "EDULV Education Leave", "EMGNY Emergency Leave", "EMTTR Volunteer EMT Training", "ESCKT Extended Sick Leave Taken", "EXERT Exercise Leave Taken", "FLEXS Flexing Schedule", "FLSAP Banked Overtime Paid", "FLSAT Banked Overtime Taken", "FPRNT Foster Parent Leave", "FTNST Emergency Fitness Leave Taken", "HCMPY Holiday Comp Taken", "JURYD Jury Duty", "LWPSD Leave Without Pay - Discipline", "LWPEO Leave Without Pay - Employee", "LWPFES Leave Without Pay - Empl Sick", and "LWPFV Leave Without Pay - Family Sck".

Step	Action
8.	Click the scrollbar to navigate down the selection.



This screenshot is similar to the previous one, but the scrollbar in the "Look Up Time Reporting Code" dialog box has been moved down. The visible list of codes now includes "EDULV Education Leave", "EMGNY Emergency Leave", "EMTTR Volunteer EMT Training", "ESCKT Extended Sick Leave Taken", "EXERT Exercise Leave Taken", "FLEXS Flexing Schedule", "FLSAP Banked Overtime Paid", "FLSAT Banked Overtime Taken", "FPRNT Foster Parent Leave", "FTNST Emergency Fitness Leave Taken", "HCMPY Holiday Comp Taken", "JURYD Jury Duty", "LWPSD Leave Without Pay - Discipline", "LWPEO Leave Without Pay - Employee", "LWPFES Leave Without Pay - Empl Sick", "LWPFV Leave Without Pay - Family Sck", "LWPPR Leave Without Pay - Parental", "LWPHC Leave Without Pay - Wrkrs Comp", "MLTYT Military Leave Taken", "NGADT National Guard Active Duty Tak", "OHCPY Optional Holiday Comp Taken", "ONCLL On-Call Duty", "RDORS Red Cross Disaster Service", "REGDS Reg Hrs Wrkd - Disaster Services", "REGHR Regular Hours Worked", "REGHW Reg Hrs Worked on Holiday", "REGOH RegHol Work in lieu of Opt Hol", "RLELV Rsrv Lw Enfrmnt Off Training", "SCKPT Sick Leave Pool Taken", "SICKT Sick Leave Taken", "SPECT Special Leave Taken", "VFFTR Volunteer Firefighter Training", "VOTES Leave to Vote", and "WELLT Wellness Leave Taken".

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Step	Action
9.	Click the Regular Hours Worked link. Regular Hours Worked
10.	Enter the actual hours worked into the Mon 4/6 field. Enter " 8.00 ". <input type="text" value="0.00"/>
11.	Enter the actual hours worked into the Tue 4/7 field. Enter " 10.00 ". <input type="text" value="0.00"/>
12.	Enter the actual hours worked into the Wed 4/8 field. Enter " 10.00 ". <input type="text" value="0.00"/>
13.	Enter the actual hours worked into the Thu 4/9 field. Enter " 8.00 ". <input type="text" value="0.00"/>
14.	Enter the actual hours worked into the Fri 4/10 field. Enter " 8.00 ". <input type="text" value="0.00"/>
15.	The employee has entered a total of 44 regular hours worked for the week of April 6 through April 10. When Time Administration processes, it will create 40 hours of regular time, and 4 hours of comp time for exempt employees or 6 hours of overtime for non-exempt employees. Click the E-Sign & Submit button. E-Sign & Submit
16.	Click the OK button. <input type="button" value="OK"/>
17.	Congratulations! You have completed this lesson. End of Procedure.

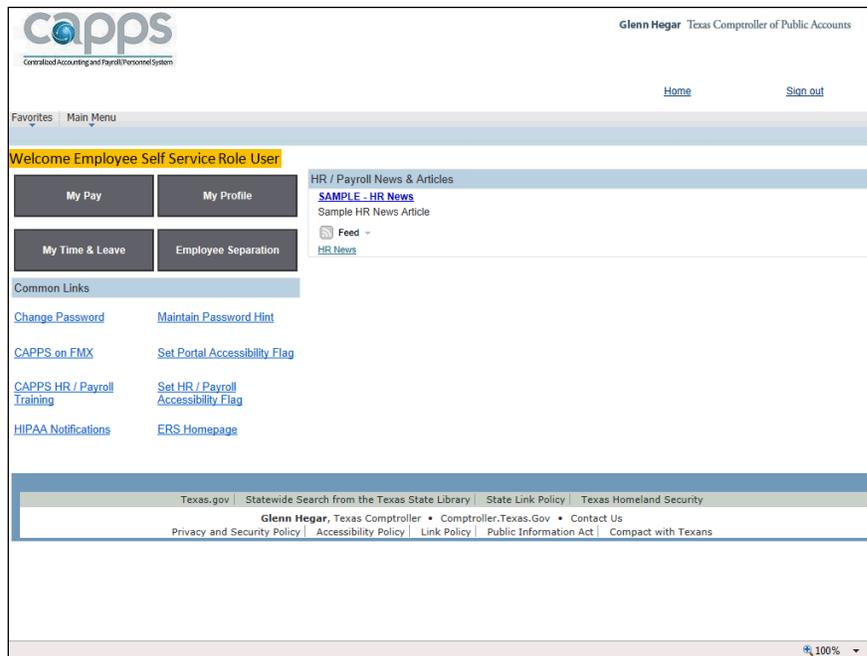
Entering Leave Time Taken - Positive Time Reporter

Section 1 - Lesson 3 Positive Time Reporters Exercises - Scenario 4: Entering Leave Time Taken

Procedure

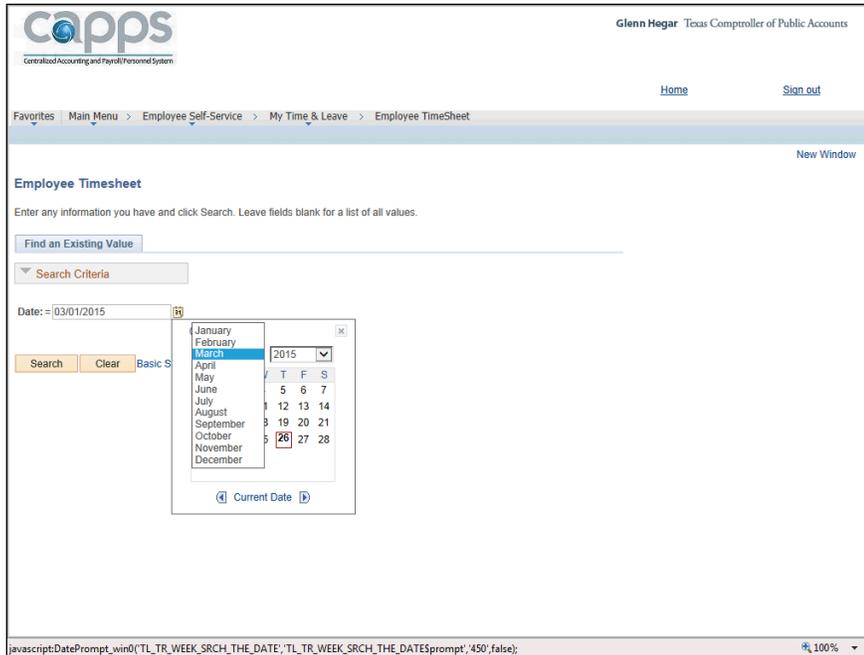
On 4/20/2015, a Positive Time Reporter, worked four hours and took four hours annual leave.

In this lesson you will learn how to enter leave time and regular time worked on the same day. However, you can also enter leave time for an entire day.



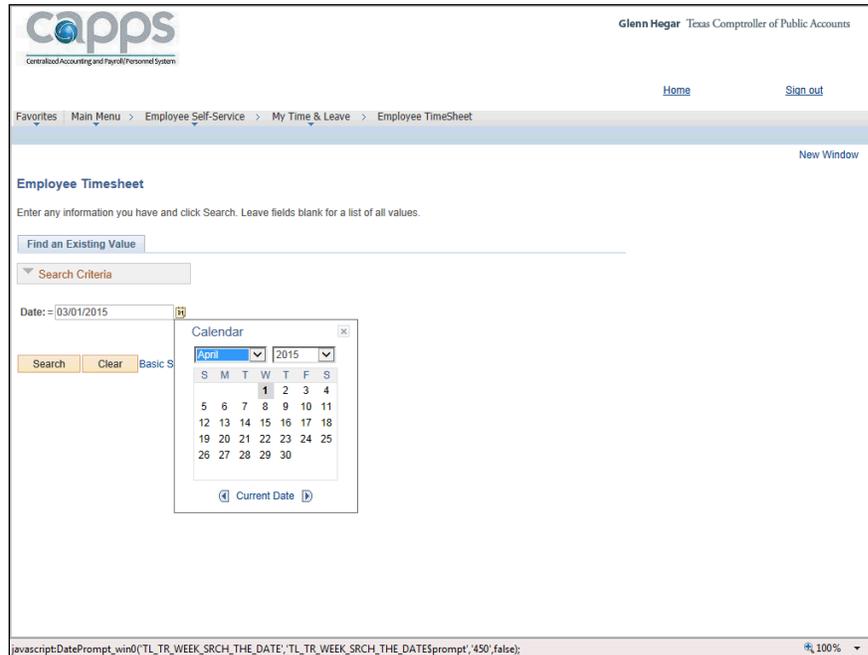
Step	Action
1.	Click the My Time & Leave button. 
2.	Click the Employee TimeSheet link. 
3.	Click the Choose a date (Alt+5) button. 

Step	Action
4.	Click the drop down arrow. 

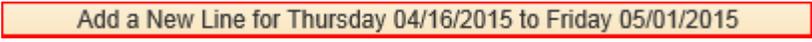
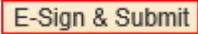


The screenshot shows the CAPPS Employee Timesheet interface. The page title is "Employee Timesheet". Below the title, there is a search bar with a "Find an Existing Value" button. A "Search Criteria" dropdown is open, showing a date field with the value "03/01/2015". A calendar pop-up is displayed, showing the months from January to December. The month "April" is highlighted in blue. The calendar shows the days of the week (T, F, S) and the dates for each month. The current date is indicated as "Current Date".

Step	Action
5.	Click April from the list. April



Step	Action
6.	Click the '1' link for the first of the month. 
7.	Click the Search button. 
8.	Positive Time Reporters need to enter hours worked and leave hours taken. Click the Look up Time Reporting Code (Alt+5) button. 
9.	Click the Annual Leave Taken link. 
10.	Enter the annual leave taken into the Mon 4/20 field. In this example enter " 4.00 ". 

Step	Action
11.	Next, you are going to enter the four hours that he/she actually worked in this example. It is important to note that when you use a different Time Reporting Code (TRC) you must use a different line.
12.	Click the Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015 button. 
13.	Click the Look up Time Reporting Code (Alt+5) button. 
14.	Click the scrollbar to navigate down the list.
15.	Click the REGHR link. 
16.	Enter the hours that were actually worked into the Mon 4/20 0.00 field. Enter " 4.00 ". 
17.	Notice how two lines are now displayed. One for Annual Leave Taken, and one for Regular Hours Worked.
18.	Click the scrollbar to navigate down the page.
19.	Click the E-Sign & Submit button. 
20.	Click the OK button. 
21.	Notice the four hours of Annual Leave in a Pending Approval status. When the manager approves the leave, the time will be ready to be processed.
22.	Congratulations! You have completed this lesson. End of Procedure.

Exception Time Reporters

Section 1, Lesson 3

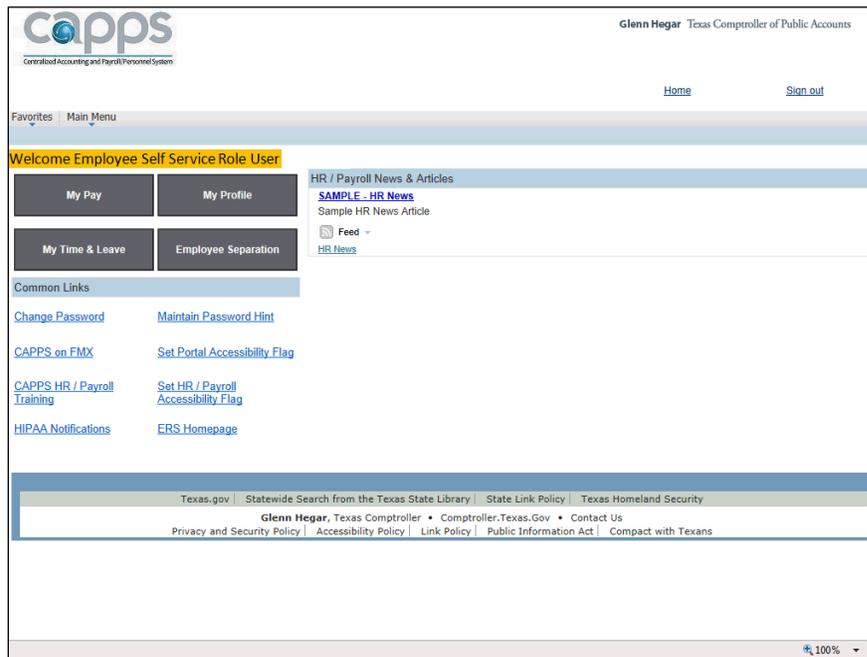
Exception Time Reporters

Enter Overtime/Comp Time Worked

Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 5: Enter Overtime/Comp Time Worked

Procedure

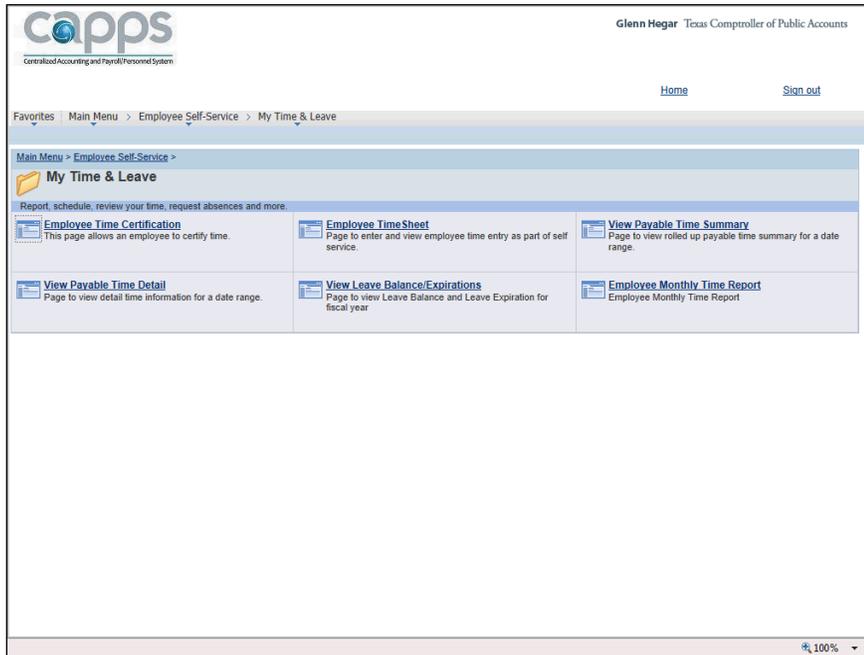
In this lesson you will learn how to enter additional hours worked for an Exception Time Reporter.



Step	Action
1.	Click the My Time & Leave button. 

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Step	Action
2.	Click the Employee TimeSheet link. Employee Time Shee
3.	Make sure that you are on the correct month. If not, change the date to the first day of the correct month.
4.	Click the Search button. Search
5.	VERY IMPORTANT NOTE: A good rule to remember: If the Time Reporting Code (TRC) is different, you need a new line to enter time. If it is the same, you can use the same line. For example: if you took Sick Leave on Monday and Tuesday of the same week, you could enter time for both days on the same line.
6.	Click the Add a New Line ... button. Add a New Line for Sunday 03/01/2015 to Sunday 03/15/2015

Step	Action
7.	<p>When adding additional time worked you need to add your scheduled hours and the additional hours worked.</p> <p>In this example, the scheduled hours to work is eight (8). The employee worked two (2) extra hours on Monday and Tuesday, March 9 and 10.</p> <p>The total Regular Hours worked will be eight scheduled hours plus two overtime hours for a total of 10 hours.</p>
8.	<p>The Time Reporting Code for Overtime/Comp /Time is 'REGHR'.</p> <p><u>Exempt and Non-exempt employees will both enter additional hours worked in the same way.</u></p> <ul style="list-style-type: none"> - Exempt employee's time will bank as Comp Time Earned. - Non-Exempt employee's time will bank FLSA Overtime. <p>Enter the TRC "REGHR".</p>
9.	<p>Enter the hours worked into the Mon 3/9 8.00 field.</p> <p>In this example you would enter "10". (<i>eight regular hours worked plus two overtime hours worked</i>)</p> <p><input type="text" value="0.00"/></p>
10.	<p>Enter the hours worked into the Tue 3/10 8.00 field.</p> <p>Enter "10".</p> <p><input type="text" value="0.00"/></p>
11.	<p>The employee worked their regular scheduled hours for the remainder of the week. Therefore, no additional time entry was required.</p>
12.	<p>Click the scrollbar to navigate to the bottom of the page.</p>
13.	<p>Click the E-Sign & Submit button.</p> <p><input type="button" value="E-Sign & Submit"/></p>
14.	<p>Click the OK button.</p> <p><input type="button" value="OK"/></p>

Step	Action
15.	After approval and Time Administration has processed, the system will automatically calculate the hours and apply them to the applicable totals (Comp Time or FLSA Overtime) based on your Exempt or Non-Exempt status.
16.	Congratulation! You have successfully completed this lesson. End of Procedure.

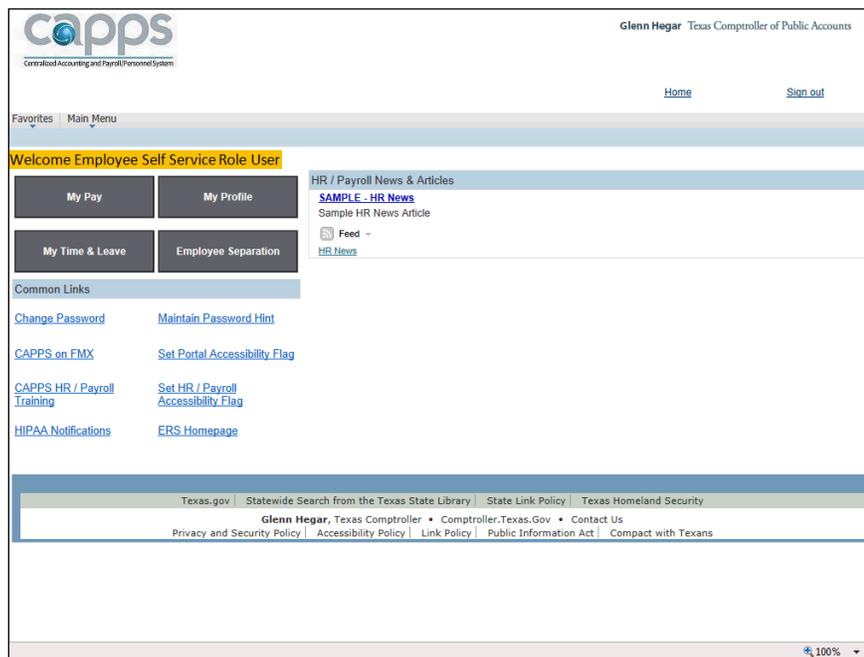
Enter Time for Flex Schedule

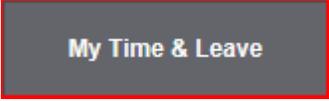
Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 6: Enter Time for a Flex Schedule

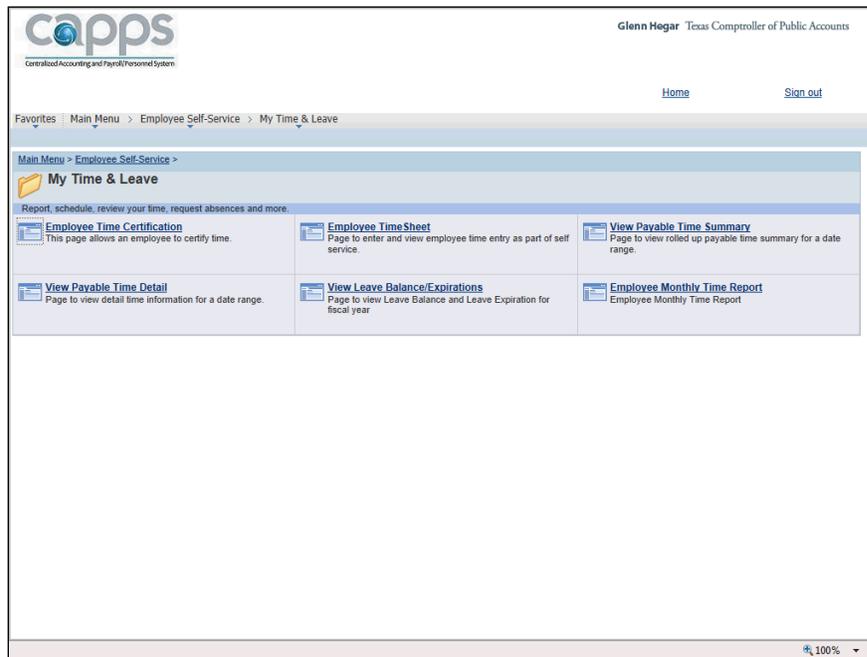
Procedure

The TRC FLEXS (Flex Schedule) enables you to flex your schedule.

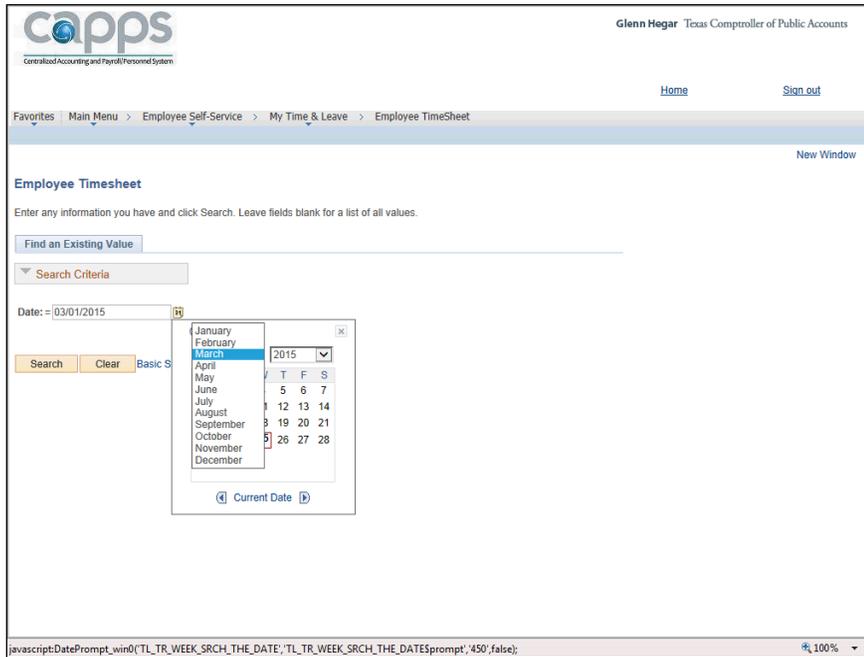
In this lesson an Exception Time Reporter was asked by their manager to work on a Saturday rather than their scheduled day. On Thursdays the employee normally works eight hours.



Step	Action
1.	Click the My Time & Leave button. 



Step	Action
2.	Click the Employee TimeSheet link. 
3.	Click the Choose a date (Alt+5) button. 
4.	Click drop down arrow. 



Employee Timesheet

Date: = 03/01/2015

Search Criteria

Search Clear Basic S

January
February
March
April
May
June
July
August
September
October
November
December

2015

T F S

5 6 7

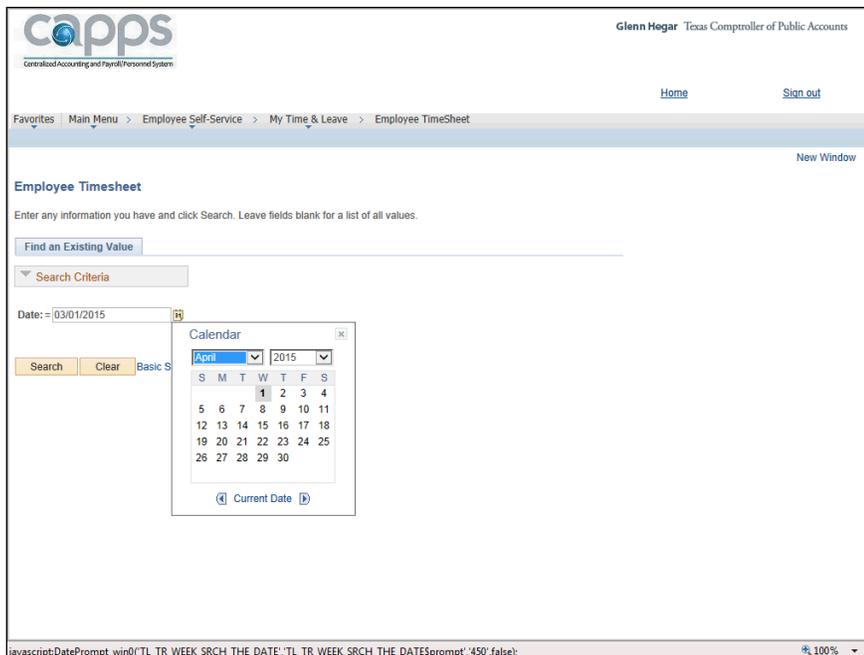
12 13 14

19 20 21

26 27 28

Current Date

Step	Action
5.	Click April from the list. April



Employee Timesheet

Date: = 03/01/2015

Search Criteria

Search Clear Basic S

Calendar

April 2015

S M T W T F S

1 2 3 4

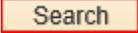
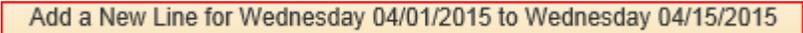
5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30

Current Date

Step	Action
6.	Click the '1' link to display the whole month of April. 
7.	Click the Search button. 
8.	Remember, the Exception Time Reporter was asked by his/her manager to work on Saturday instead of Thursday. The employee is going to reflect this change on the Timesheet.
9.	It is important to note: Exception Time Reporters only need to make changes to their Timesheet when it is different from their schedule. Notice how the employee's schedule on 4/2 reflects eight hours. The employee is not going to work on Thursday. If the employee does not adjust their schedule, they will inaccurately bank comp time or overtime.
10.	When flexing your schedule use the TRC FLEXS . Since every different TRC needs its own unique line, the first thing the employee will need to do is add a line. Click the Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015 button. 
11.	Click the Look up Time Reporting Code (Alt+5) button. 
12.	The employee needs to use the FLEXS Time Reporting Code to indicate that he is not working his scheduled time on Thursday. Click the FLEXS link. 
13.	The employee will enter eight hours of FLEXS time on Thursday. Enter the schedule hours into the Thu 4/2 field. Enter "8". 

Step	Action
14.	<p>The employee needs to use the REGHR Time Reporting Code to indicate that he is working on Saturday.</p> <p>Click the Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015 button.</p> <p>Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015</p>
15.	<p>Click the Look up Time Reporting Code (Alt+5) button.</p> 
16.	Click the scrollbar to navigate down the list.
17.	<p>The time worked on the unscheduled day will be charged to regular time.</p> <p>Click the REGHR link.</p> <p>REGHR</p>
18.	<p>Enter the eight hours worked on the REGHR line in the Sat 4/4 field.</p> <p>Enter "8".</p> <p>0.00</p>
19.	The employee's timesheet now reflects the time worked on the unscheduled day and the time not worked on the scheduled day.
20.	<p>Click the E-Sign & Submit button.</p> <p>E-Sign & Submit</p>
21.	<p>Click the OK button.</p> <p>OK</p>
22.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

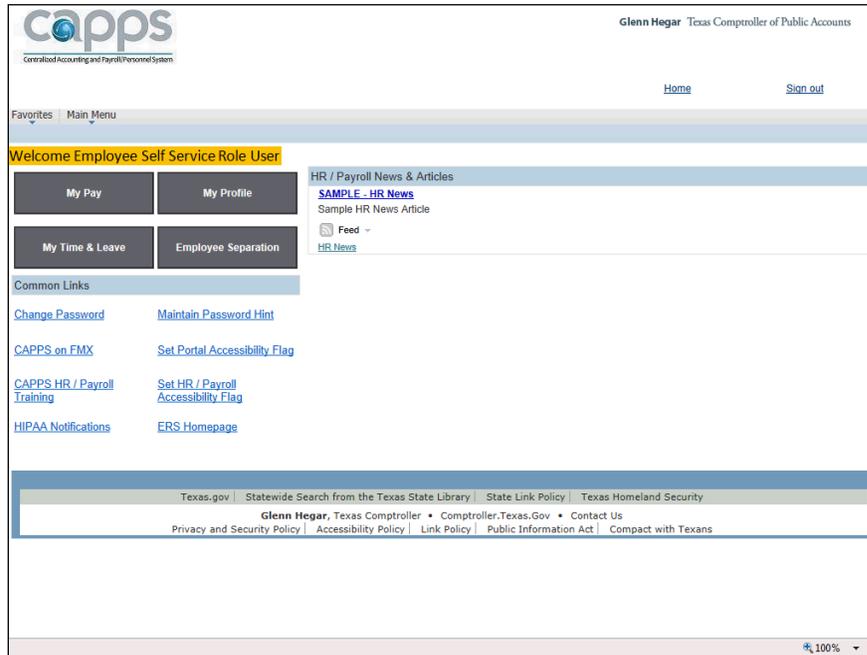
Enter Annual Leave Taken

Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 7: Enter Annual Leave Taken

Procedure

In this lesson you will learn how to enter Annual Leave.

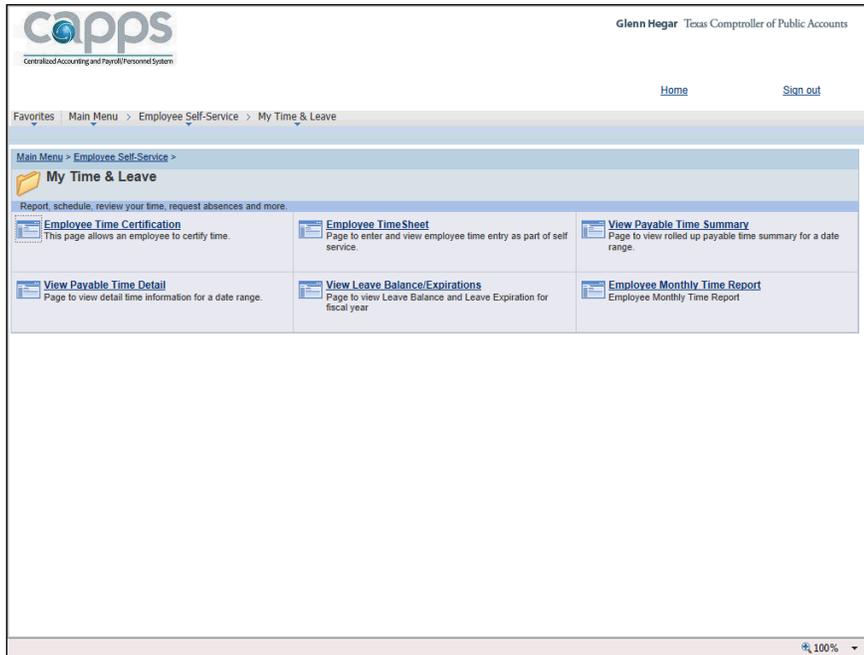
The Exception Time Reporter will enter eight hours of annual leave Monday, March 16.

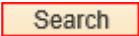


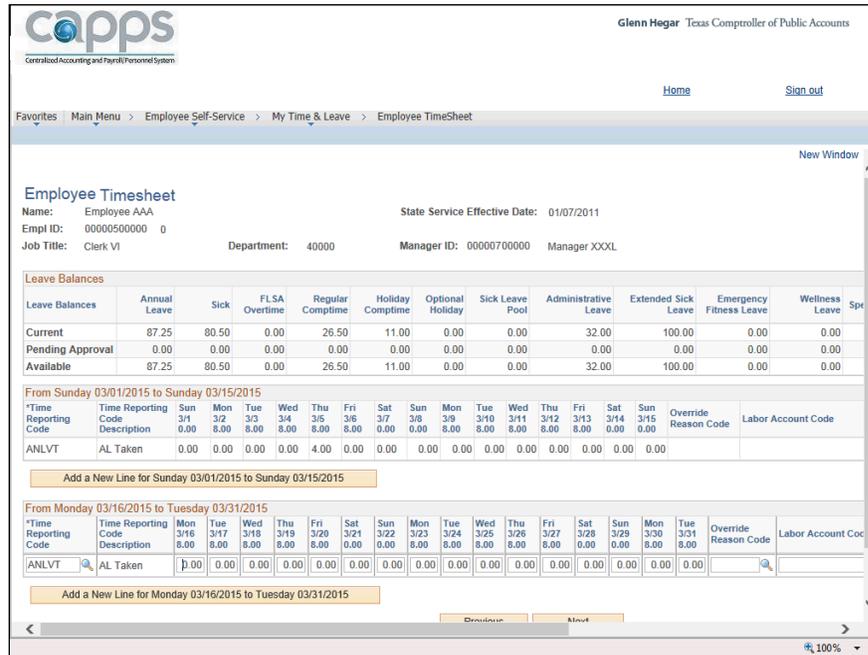
Step	Action
1.	Click the My Time & Leave button. <div data-bbox="440 1100 769 1199" style="border: 2px solid red; padding: 5px; text-align: center; margin: 10px 0;"> My Time & Leave </div>

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Step	Action
2.	Click the Employee TimeSheet link. 
3.	Click the Search button. 
4.	Click the Look up Time Reporting Code (Alt+5) button. 
5.	Click the ANLVT link for Annual Leave Taken. 



Employee Timesheet
 Name: Employee AAA
 Empl ID: 0000500000 0
 Job Title: Clerk VI
 Department: 40000
 Manager ID: 0000700000
 Manager XXXL
 State Service Effective Date: 01/07/2011

Leave Balances	Annual Leave	Sick	FLSA Overtime	Regular Comptime	Holiday Comptime	Optional Holiday	Sick Leave Pool	Administrative Leave	Extended Sick Leave	Emergency Fitness Leave	Wellness Leave	Spec
Current	87.25	80.50	0.00	26.50	11.00	0.00	0.00	32.00	100.00	0.00	0.00	0.00
Pending Approval	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Available	87.25	80.50	0.00	26.50	11.00	0.00	0.00	32.00	100.00	0.00	0.00	0.00

From Sunday 03/01/2015 to Sunday 03/15/2015

*Time Reporting Code	Time Reporting Description	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5	Fri 3/6	Sat 3/7	Sun 3/8	Mon 3/9	Tue 3/10	Wed 3/11	Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Override Reason Code	Labor Account Code
ANLVT	AL Taken	0.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		

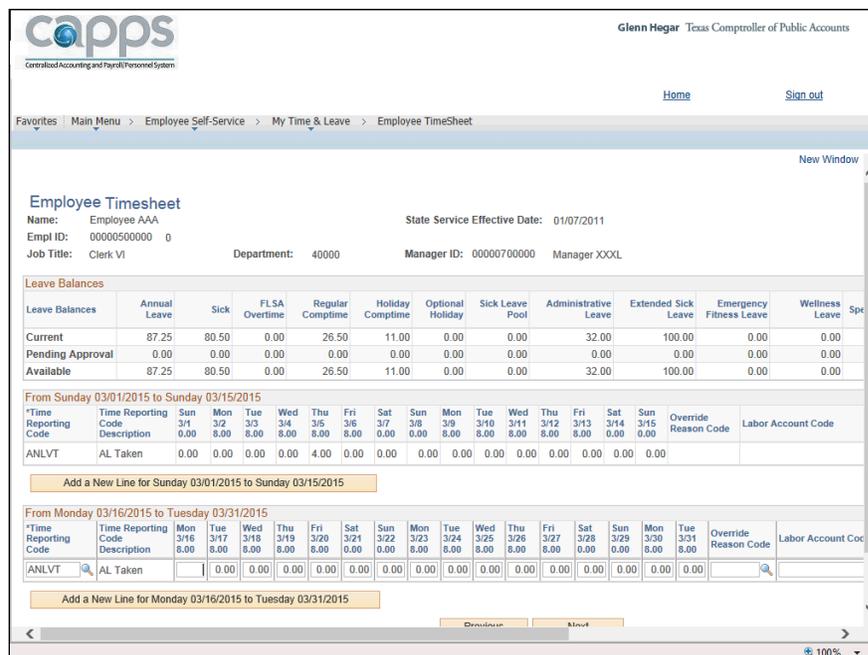
Add a New Line for Sunday 03/01/2015 to Sunday 03/15/2015

From Monday 03/16/2015 to Tuesday 03/31/2015

*Time Reporting Code	Time Reporting Description	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26	Fri 3/27	Sat 3/28	Sun 3/29	Mon 3/30	Tue 3/31	Override Reason Code	Labor Account Code
ANLVT	AL Taken	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		

Add a New Line for Monday 03/16/2015 to Tuesday 03/31/2015

Step	Action
6.	Click in the 3/16 field. 



Employee Timesheet
 Name: Employee AAA
 Empl ID: 0000500000 0
 Job Title: Clerk VI
 Department: 40000
 Manager ID: 0000700000
 Manager XXXL
 State Service Effective Date: 01/07/2011

Leave Balances	Annual Leave	Sick	FLSA Overtime	Regular Comptime	Holiday Comptime	Optional Holiday	Sick Leave Pool	Administrative Leave	Extended Sick Leave	Emergency Fitness Leave	Wellness Leave	Spec
Current	87.25	80.50	0.00	26.50	11.00	0.00	0.00	32.00	100.00	0.00	0.00	0.00
Pending Approval	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Available	87.25	80.50	0.00	26.50	11.00	0.00	0.00	32.00	100.00	0.00	0.00	0.00

From Sunday 03/01/2015 to Sunday 03/15/2015

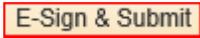
*Time Reporting Code	Time Reporting Description	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5	Fri 3/6	Sat 3/7	Sun 3/8	Mon 3/9	Tue 3/10	Wed 3/11	Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Override Reason Code	Labor Account Code
ANLVT	AL Taken	0.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		

Add a New Line for Sunday 03/01/2015 to Sunday 03/15/2015

From Monday 03/16/2015 to Tuesday 03/31/2015

*Time Reporting Code	Time Reporting Description	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26	Fri 3/27	Sat 3/28	Sun 3/29	Mon 3/30	Tue 3/31	Override Reason Code	Labor Account Code
ANLVT	AL Taken	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		

Add a New Line for Monday 03/16/2015 to Tuesday 03/31/2015

Step	Action
7.	Enter the hours for Annual Leave Taken into the Mon 3/16 field. Enter " 8.00 ". 
8.	Click the scrollbar to navigate down the page.
9.	Click the E-Sign & Submit button. 
10.	Click the OK button. 
11.	Congratulations! You have successfully completed this lesson. End of Procedure.

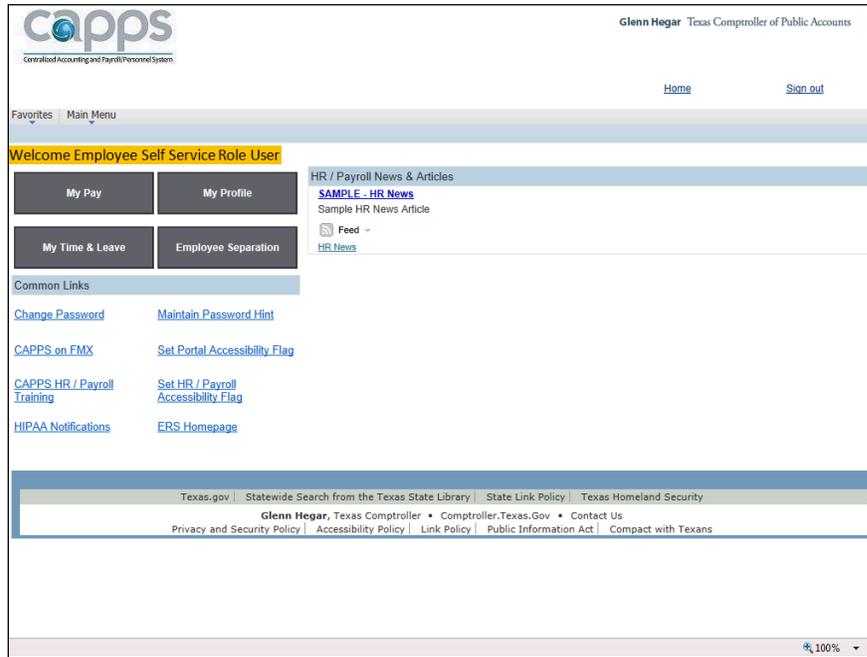
Enter Sick Time Taken

Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 8: Enter Sick Time Taken

Procedure

In this lesson you will learn how to enter sick leave. The employee is scheduled to work eight hours on 4/6, however he/she becomes ill and leaves four hours early from work.

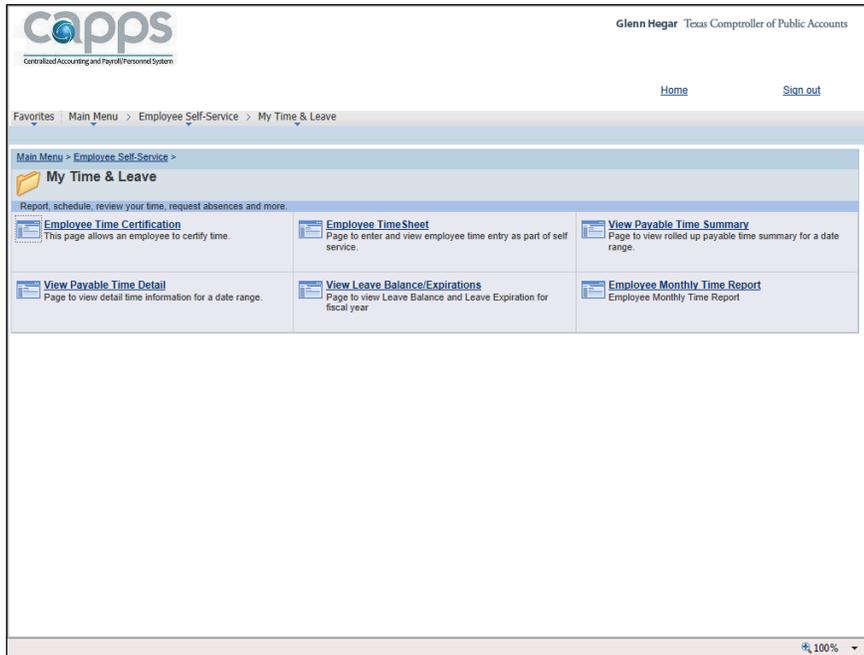
Remember: Exception Time Reporters only need to enter additional time worked or leave time taken on their timesheet.



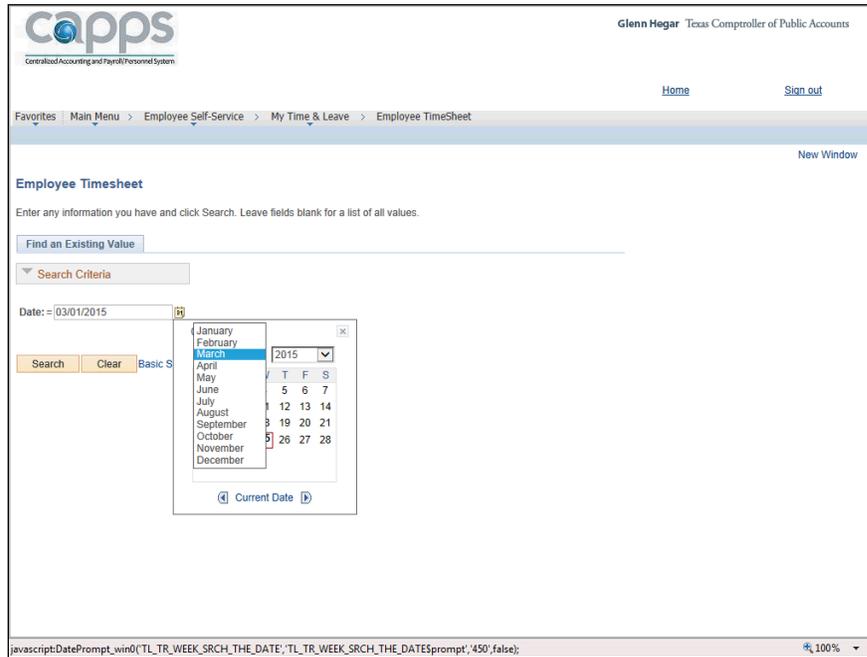
Step	Action
1.	Click the My Time & Leave button. <div data-bbox="440 1100 769 1199" style="border: 2px solid red; padding: 5px; text-align: center; margin: 10px 0;"> My Time & Leave </div>

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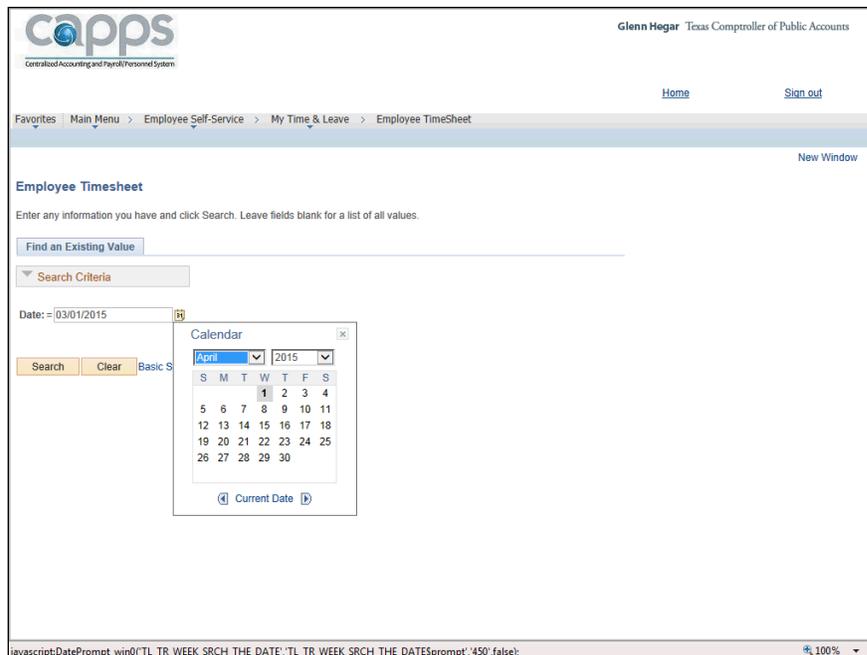


Step	Action
2.	Click the Employee TimeSheet link. 
3.	Access the Timesheet for the correct pay period. Click the Choose a date (Alt+5) button. 
4.	Click the drop down arrow. 



The screenshot shows the CAPPS Employee Timesheet page. The user is logged in as Glenn Hegar, Texas Comptroller of Public Accounts. The breadcrumb trail is: Favorites > Main Menu > Employee Self-Service > My Time & Leave > Employee TimeSheet. The page title is "Employee Timesheet". Below the title, there is a search area with a "Find an Existing Value" input field and a "Search Criteria" dropdown. The "Date" field is set to "03/01/2015". A date selection dropdown menu is open, showing a list of months from January to December for the year 2015. The "April" option is highlighted in blue. Below the list, there are "Current Date" and "D" buttons. The page footer contains a JavaScript prompt and a zoom level of 100%.

Step	Action
5.	Click April from the list. April

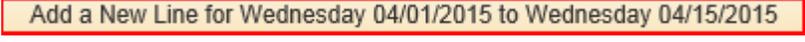
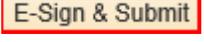
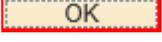


The screenshot shows the CAPPS Employee Timesheet page, similar to the previous one. The date selection dropdown menu is now in "Calendar" mode, showing a calendar for the month of April 2015. The days of the week are labeled as S, M, T, W, T, F, S. The date "1" is highlighted in blue, indicating it is the selected date. The page footer contains the same JavaScript prompt and zoom level of 100%.

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Step	Action
6.	Click the '1' link to view the entire month. 
7.	Click the Search button. 
8.	The Sick Time Balance displayed at the top for this employee's timesheet is 76.50 hours. To enter sick time on the timesheet the employee must use the correct TRC. Add a new row for the new Time Reporting Code SICKT. Click the Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015 button. 
9.	Click the Look up Time Reporting Code (Alt+5) button. 
10.	Scroll down to the Time Reporting Code "SICKT". Click the scrollbar.
11.	Click the SICKT link. 
12.	Enter the sick hours taken into the Mon 4/6 field. Enter " 4.00 ". 
13.	Click the E-Sign & Submit button. 
14.	Click the OK button. 
15.	Look at the Leave Balances at the top of the timesheet. Notice that the 4 hours of sick time is pending approval and the new Available balance is displayed. Once the sick time is approved by the manager, it will be processed by Time Administration.

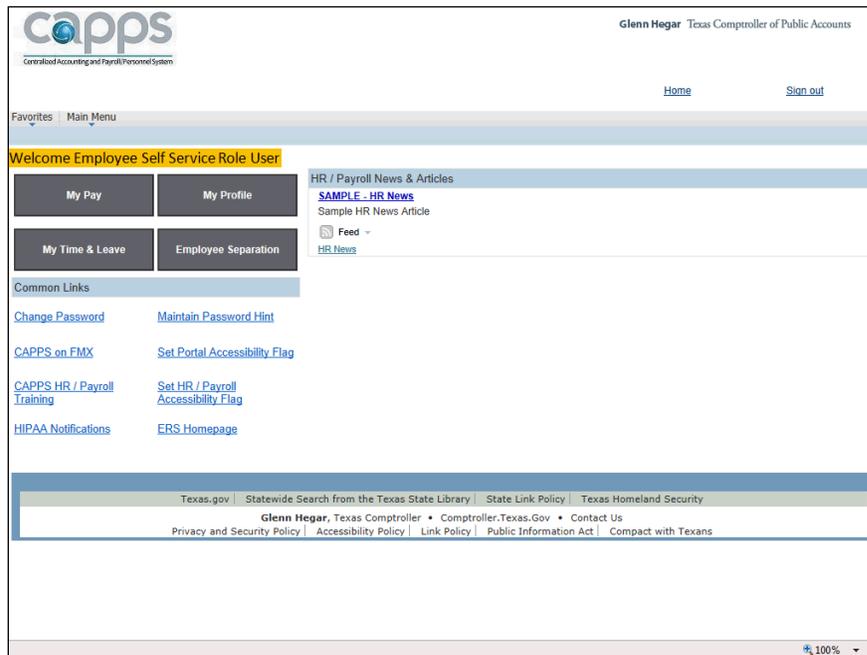
Step	Action
16.	Congratulations! You have successfully completed this lesson. End of Procedure.

Enter Regular Comp Time Taken

Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 9: Enter Regular Comp Time Taken

Procedure

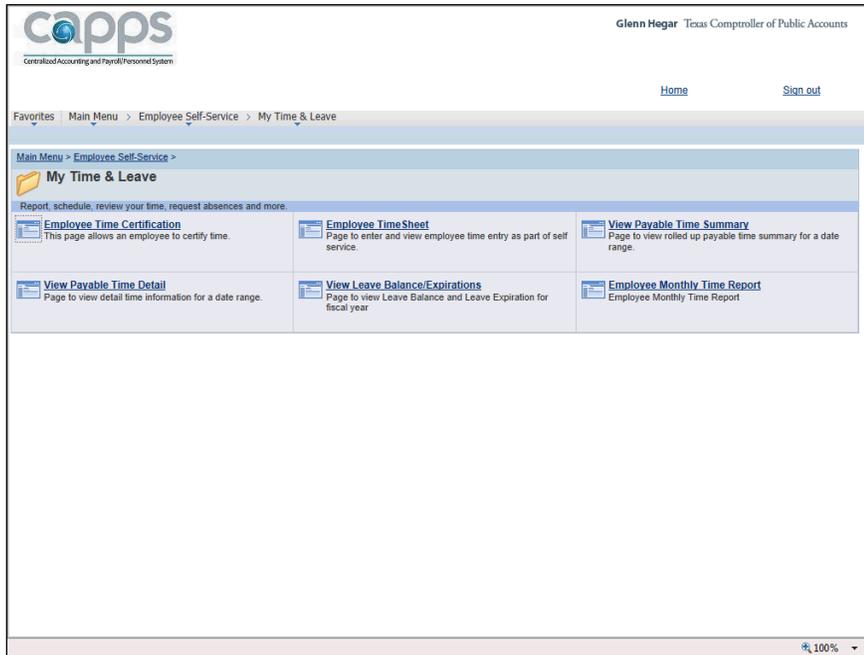
In this lesson you will learn how to enter Regular Comp Time taken. On 3/17 the employee will not work his/her scheduled hours, instead he/she is going to take eight hours of Comp Time.

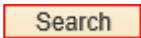
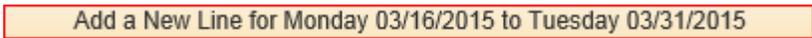


Step	Action
1.	Click the My Time & Leave button. 

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Step	Action
2.	Click the Employee TimeSheet link. 
3.	Click the Search button. 
4.	Click the scrollbar to navigate down the page.
5.	The TRC for Comp Time Taken is COMPT. The employee will need to add a new row to record the Time Reporting Code and hours. Click the Add a New Line for Monday 03/16/2015 to Tuesday 03/31/2015 button. 
6.	Click the Look up Time Reporting Code (Alt+5) button. 
7.	Choose the Time Reporting Code for Compensatory Time (Comp Time) Taken. Click the COMPT link. 

Step	Action
8.	Enter the Comp Time hours taken into the Tue 3/17 field. Enter " 8.00 ". <input type="text"/>
9.	Click the scrollbar to navigate down the page.
10.	Click the E-Sign & Submit button. 
11.	Click the OK button. 
12.	Once the timesheet is 'E-Sign & Submitted', the eight hours of Regular Comptime will appear in the Pending Approval row of the Leave Balances section of the timesheet.
13.	The Available balance reflects the Current - the Pending Approval hours. In this example: 26.50 (Current) – 8.00 (Pending Approval) = 18.50 (Available) Once the manager approves and the Time Administration process runs, the Current and Pending Approval hours will be adjusted, accordingly.
14.	Congratulations! You have successfully completed this lesson. End of Procedure.

Enter FLSA Overtime Taken

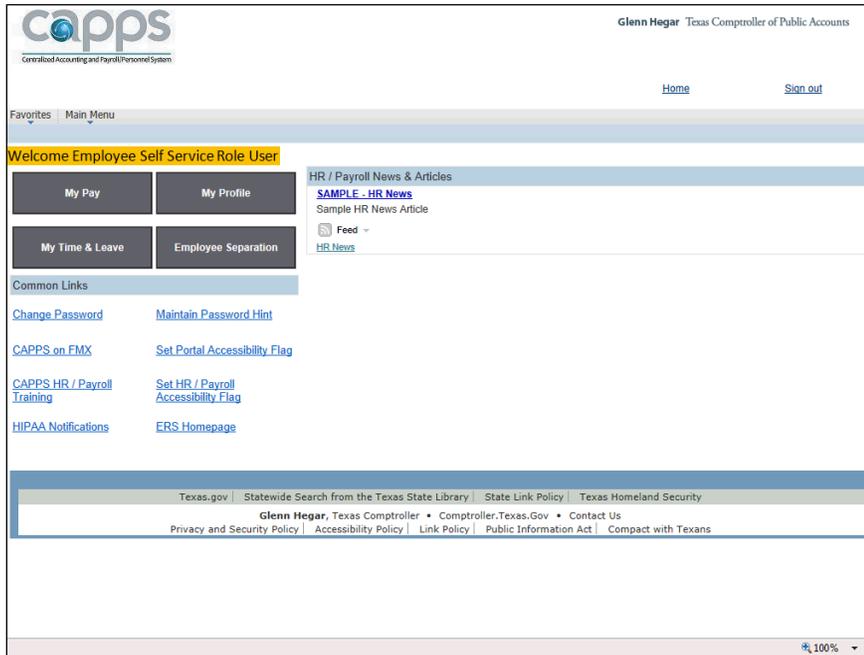
Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 10: Enter FLSA Overtime Taken

Procedure

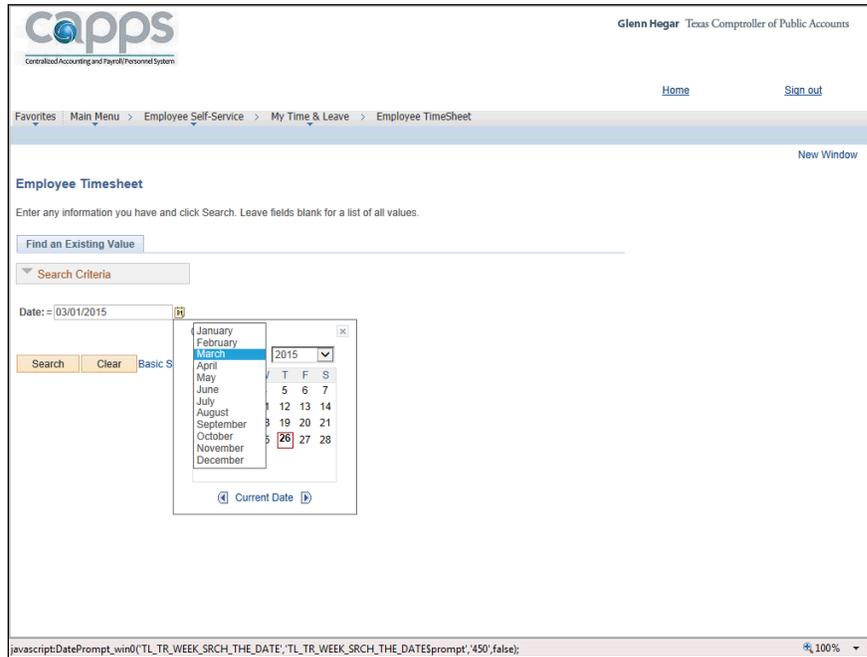
In this lesson you will learn how to take banked overtime. On 4/1 the employee will not work his/her regular hours, instead he/she will use FLSA overtime hours as their leave time.

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Step	Action
1.	Click the My Time & Leave button. 
2.	Click the Employee TimeSheet link. 
3.	Click the Choose a date (Alt+5) button. 
4.	Click the drop down arrow. 



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Home Sign out

Favorites Main Menu > Employee Self-Service > My Time & Leave > Employee TimeSheet

New Window

Employee Timesheet

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Date: = 03/01/2015

Search Clear Basic S

January
February
March
April
May
June
July
August
September
October
November
December

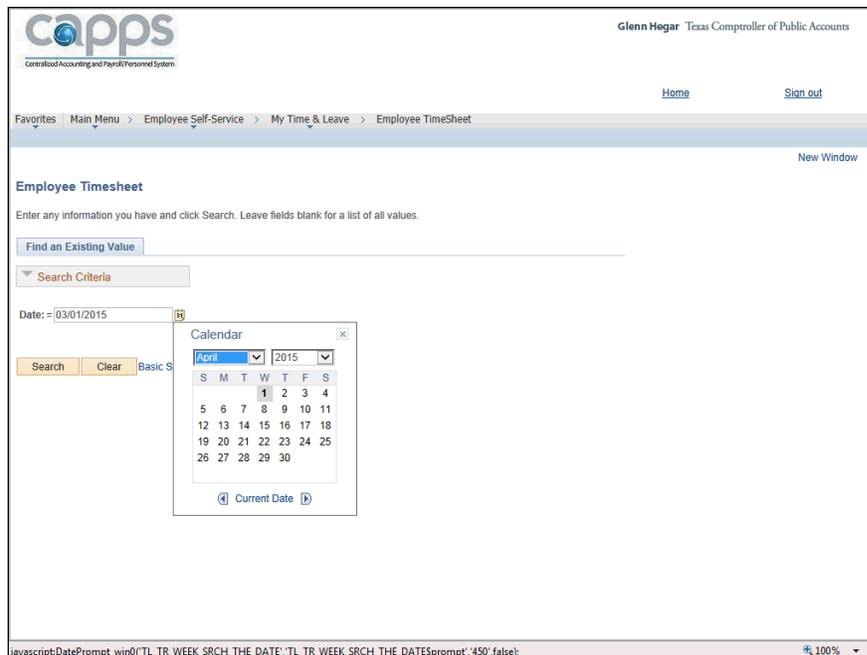
2015

T F S
5 6 7
12 13 14
19 20 21
26 27 28

Current Date

javascript:DatePrompt_win0(TL_TR_WEEK_SRCH_THE_DATE;TL_TR_WEEK_SRCH_THE_DATES\$prompt;450;false); 100%

Step	Action
5.	Click April from the list. April



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Home Sign out

Favorites Main Menu > Employee Self-Service > My Time & Leave > Employee TimeSheet

New Window

Employee Timesheet

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Date: = 03/01/2015

Search Clear Basic S

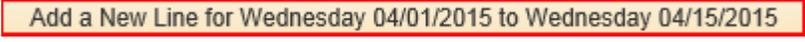
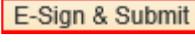
Calendar

April 2015

S M T W T F S
1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30

Current Date

javascript:DatePrompt_win0(TL_TR_WEEK_SRCH_THE_DATE;TL_TR_WEEK_SRCH_THE_DATES\$prompt;450;false); 100%

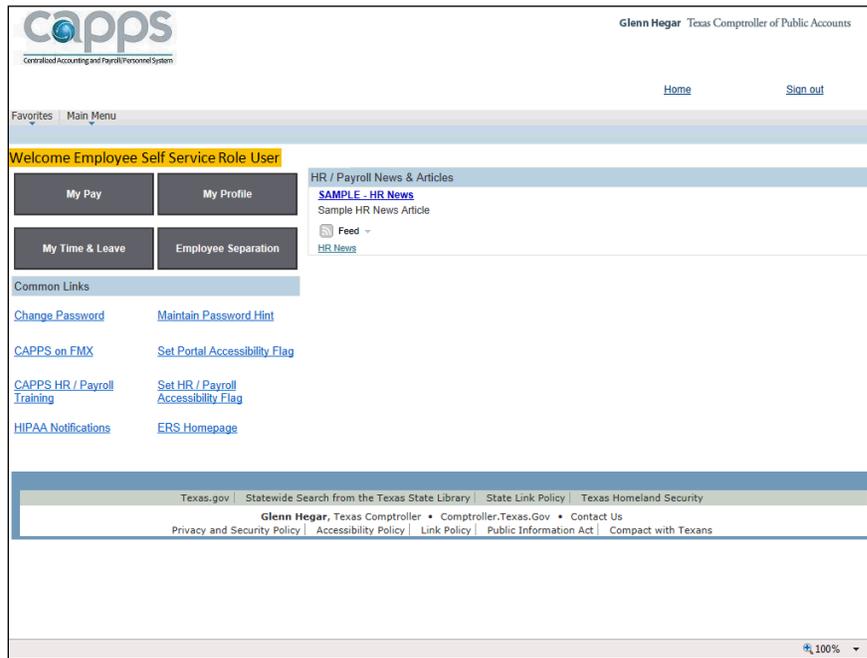
Step	Action
6.	Click the '1' link to view the whole month. 
7.	Click the Search button. 
8.	The employee is going to use FLSA Overtime to take a day off.
9.	Click the Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015 button. 
10.	Click the Look up Time Reporting Code (Alt+5) button. 
11.	The Time Reporting Code for Banked Overtime Taken is "FLSAT". Click the FLSAT link. 
12.	Enter the leave hours into the Wed 4/1 field. Enter "8.00" . 
13.	Click the scroll bar.
14.	Click the E-Sign & Submit button. 
15.	Click the OK button. 
16.	The eight hours the employee recorded for FLSAT leave is in a Pending Approval status. Once the time is approved by the manager the hours will be processed by Time Administration.
17.	Congratulations! You have successfully completed this lesson. End of Procedure.

Enter Leave Without Pay

Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 11: Enter Leave Without Pay

Procedure

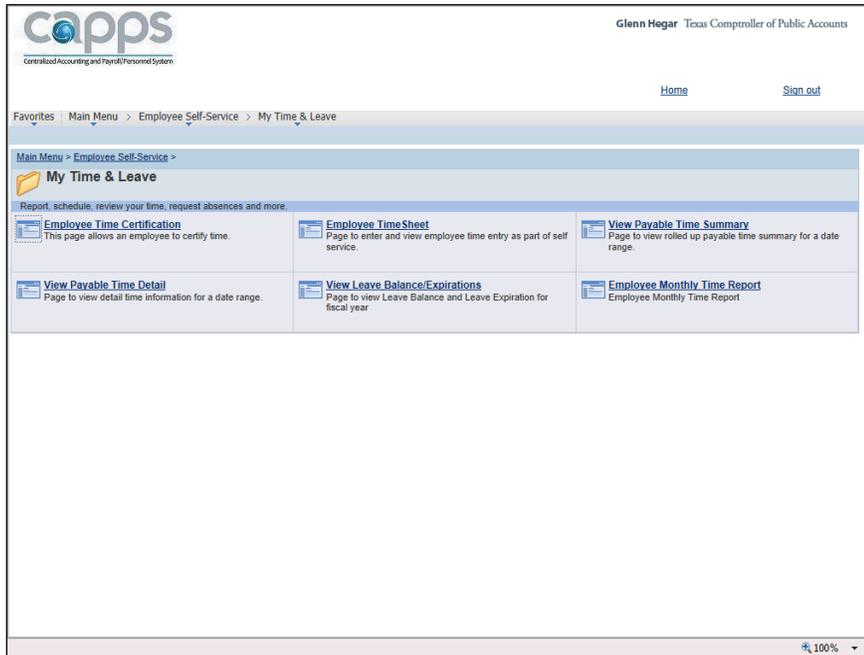
In this lesson you will learn how to enter leave without pay. The employee has no leave time available, but needs to take their scheduled days 4/16 and 4/17 off.



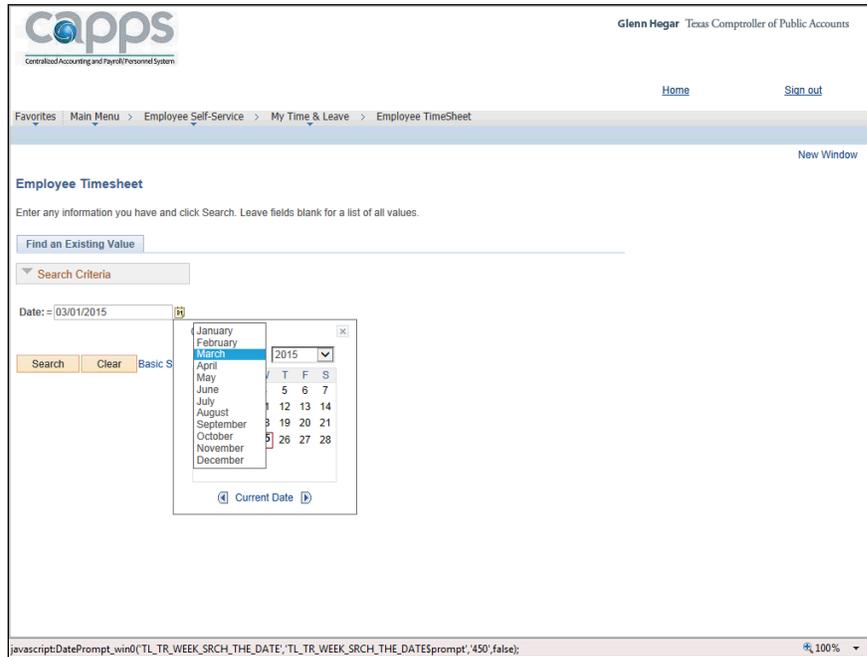
Step	Action
1.	Click the My Time & Leave button. 

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Step	Action
2.	Click the Employee TimeSheet link. 
3.	The employee was absent from work without pay for two days. The employee will enter it on the timesheet. Click the Choose a date (Alt+5) button. 
4.	Click the button to the right of the field. 



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Home Sign out

Favorites Main Menu > Employee Self-Service > My Time & Leave > Employee TimeSheet

New Window

Employee Timesheet

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Date: = 03/01/2015

Search Clear Basic S

January
February
March
April
May
June
July
August
September
October
November
December

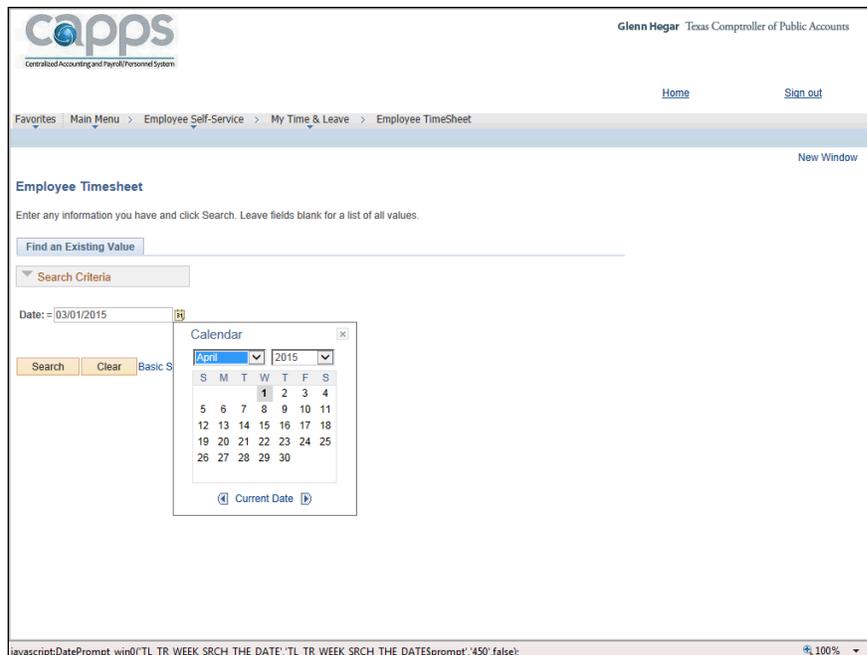
2015

T F S
5 6 7
12 13 14
19 20 21
26 27 28

Current Date

javascript:DatePrompt_win0(TL_TR_WEEK_SRCH_THE_DATE;TL_TR_WEEK_SRCH_THE_DATES\$prompt;450;false); 100%

Step	Action
5.	Click the April list item. April



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Home Sign out

Favorites Main Menu > Employee Self-Service > My Time & Leave > Employee TimeSheet

New Window

Employee Timesheet

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Date: = 03/01/2015

Search Clear Basic S

Calendar

April 2015

S M T W T F S
1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30

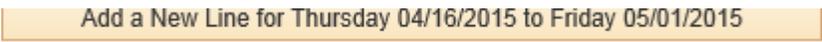
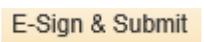
Current Date

javascript:DatePrompt_win0(TL_TR_WEEK_SRCH_THE_DATE;TL_TR_WEEK_SRCH_THE_DATES\$prompt;450;false); 100%

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Step	Action
6.	Click the 1 link. 
7.	Click the Search button. 
8.	Click the scroll bar.
9.	Since the employee has exhausted all of their leave, the time must be entered as leave without pay. Click the Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015 button. 
10.	Click the Look up Time Reporting Code (Alt+5) button.
11.	Various Leave Without Pay options are available. You would select the option that is applicable to your situation.
12.	In this example, we will select the Leave Without Pay - Employee (LWPEO) option. Click the LWPEO link. 
13.	Enter the scheduled hours not worked into the Thu 4/16 field. Enter " 8.00 ". 
14.	Enter the scheduled hours not worked into the Thu 4/17 field. Enter " 8.00 ". 
15.	The time has been entered on the days the employee was absent and it has been submitted for approval to the manager. Click the E-Sign & Submit button. 
16.	Click the OK button. 

Step	Action
17.	Congratulations! You have successfully completed this lesson. End of Procedure.

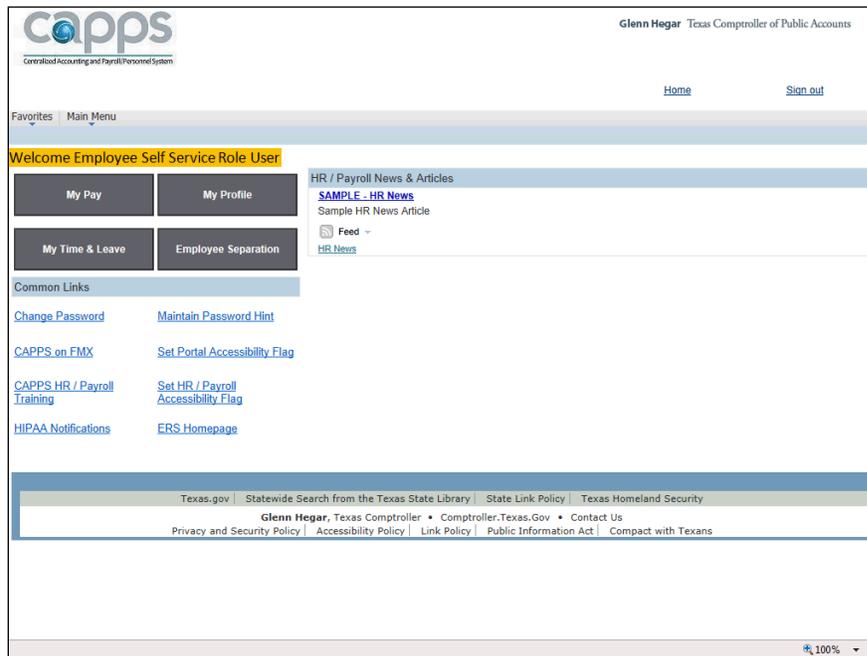
Enter Multiple Leave Types

Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 12: Enter Multiple Leave Types

Procedure

In this lesson you will learn how to enter leave time taken for more than one type of leave.

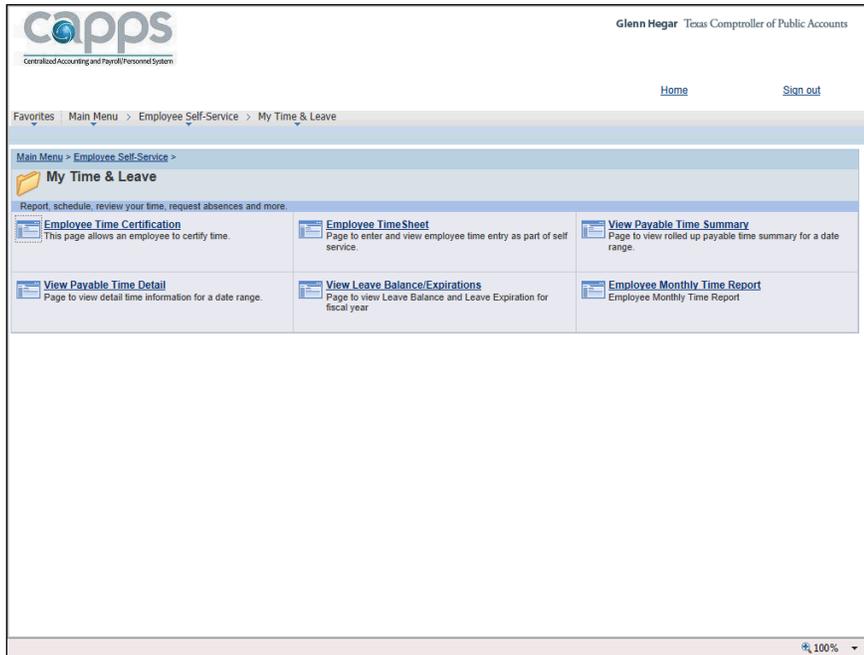
In this example, Annual Leave has already been entered. You will be entering Sick Leave on the same week.

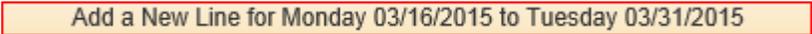


Step	Action
1.	Click the My Time & Leave button. 

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Step	Action
2.	Click the Employee TimeSheet link. 
3.	Click the Search button. 
4.	Annual Leave taken has already been entered on the Timesheet.
5.	When entering multiple leave types, it is important to remember to insert a new line when using a different Time Reporting Code on the same grid. Click the Add a New Line for Monday 03/16/2015 to Tuesday 03/31/2015 button. 
6.	The employee is going to enter Sick Time Taken, so you are adding a new line for the Time Reporting Code SICKT . Click the Look up Time Reporting Code (Alt+5) button. 
7.	Click the scrollbar to navigate down the list.

Step	Action
8.	Click the SICKT link. 
9.	Enter the sick leave hours into the Wed 3/18 field. Enter " 4.00 ". 
10.	Click the scrollbar to navigate down the page.
11.	Click the E-Sign & Submit button. 
12.	Click the OK button. 
13.	Congratulations! You have successfully completed this lesson. End of Procedure.

Enter Time Worked on a Scheduled Holiday

Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 13: Enter Time Worked on a Scheduled Holiday

Procedure

In this lesson you will learn how to enter hours worked on a holiday.

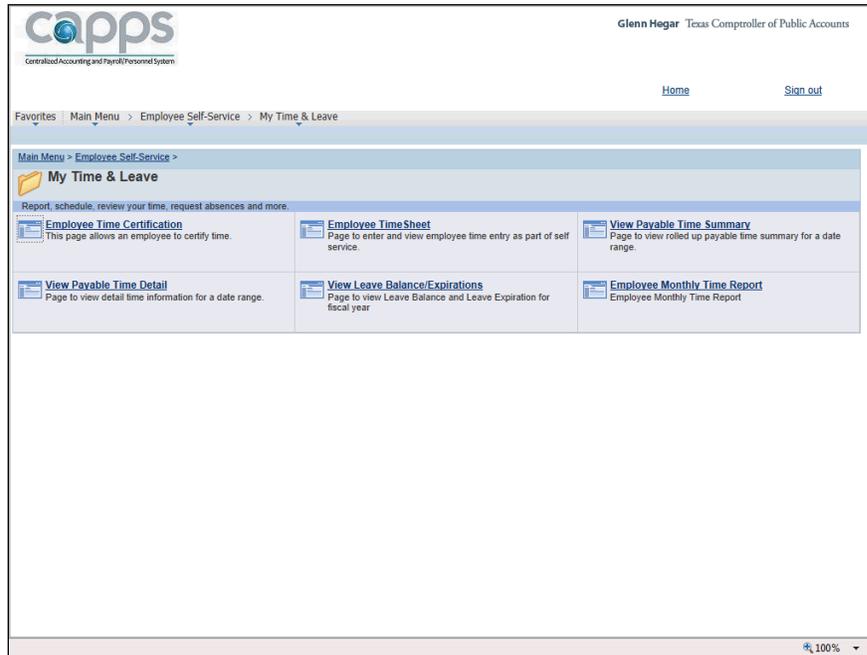
Note: If you are scheduled on a holiday and do not work on the holiday, you do not enter any hours. The system will compensate the employee according to their eligibility.

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Step	Action
1.	Click the My Time & Leave button. <div data-bbox="344 1100 673 1201" style="border: 2px solid red; padding: 5px; text-align: center; margin: 10px 0;"> My Time & Leave </div>



Step	Action
2.	Click the Employee TimeSheet link. 
3.	Click the Choose a date (Alt+5) button. 
4.	Click the drop down arrow. 

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[Home](#) [Sign out](#)

[Favorites](#) [Main Menu](#) > [Employee Self-Service](#) > [My Time & Leave](#) > [Employee TimeSheet](#)

New Window

Employee Timesheet

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value _____

Search Criteria

Date: = 03/01/2015

 Basic S

javascript:DatePrompt_win0(TL_TR_WEEK_SRCH_THE_DATE;TL_TR_WEEK_SRCH_THE_DATES\$prompt;450;false);
 100%

Step	Action
5.	Click May from the list. May

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[Favorites](#) [Main Menu](#) > [Employee Self-Service](#) > [My Time & Leave](#) > [Employee TimeSheet](#)

New Window

Employee Timesheet

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value _____

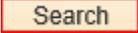
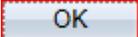
Search Criteria

Date: = 03/01/2015

 Basic S

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

javascript:DatePrompt_win0(TL_TR_WEEK_SRCH_THE_DATE;TL_TR_WEEK_SRCH_THE_DATES\$prompt;450;false);
 100%

Step	Action
6.	Click the '1' link to display the entire month. 
7.	Click the Search button. 
8.	For an employee whose holiday falls on a regularly scheduled workday and the employee works the only timesheet entry made is REGHW for the number of hours worked for the day. In this example, the employee worked five hours on the holiday.
9.	Click the Look up Time Reporting Code (Alt+5) button. 
10.	Click the scrollbar to navigate down the list.
11.	Click the REGHW link. 
12.	Enter the number of hours that the employee worked on the holiday into the Mon 5/25 field. Enter "5.00". 
13.	Click the scrollbar to navigate down the page.
14.	Click the E-Sign & Submit button. 
15.	The system reminds you that this is a holiday. Click the OK button. 
16.	Click the OK button. 

Step	Action
17.	<p>There are other options relating to Holiday hours:</p> <p>Non-Scheduled Holiday: If a holiday falls on a day that the employee is not scheduled and the employee physically works the holiday, then the employee enters their hours worked with the REGHR TRC. This will result in the employee banking comp time for the hours worked. The employee will also earn COMPH in their Comp Time leave balance to account for holiday hours they are eligible for. This will allow them to take the hours for the holiday on another day (Holiday Bank).</p> <p>Work More Than The Authorized Hours: If an employee is authorized for 8 hours on a holiday, but is scheduled for 10 hours and physically works 10 hours, then the employee needs to enter 8 hours REGHW and 2 hours REGHR. If this same employee does not work on the holiday, then they need to enter 2 hours of Leave on the holiday, or CAPPS will automatically deduct available leave up to 2 hours or create an exception if 2 hours of leave is not available. (Note: The available leave must be from one leave type.)</p>
18.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Enter Optional Holiday Time Taken and Work a Holiday

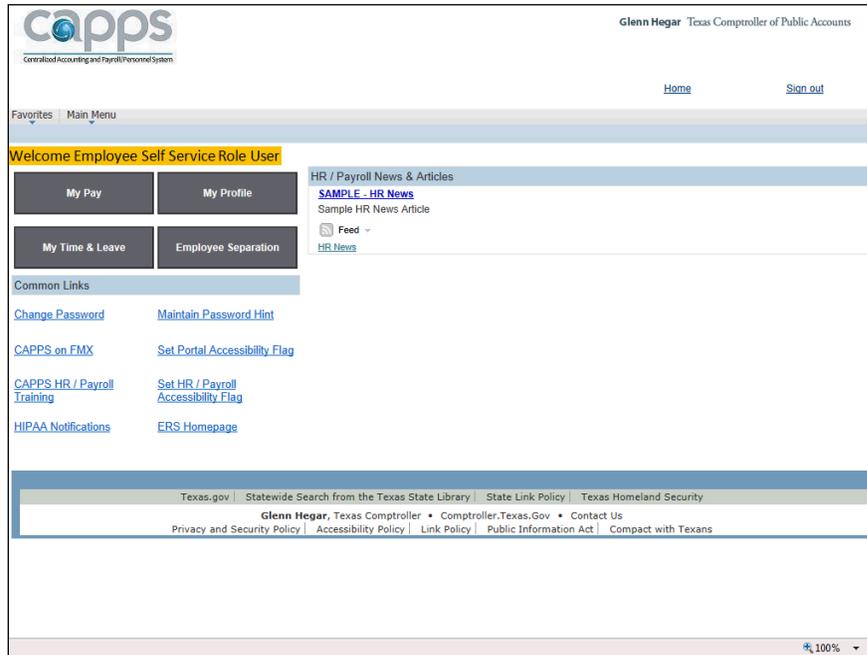
Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 14: Enter Optional Holiday Time Taken and Work a Holiday

Procedure

In this lesson you will learn how to take an Optional Holiday.

The employee has taken March 31, 2015, Cesar Chavez Day, as an optional holiday. The employee will enter it on the timesheet.

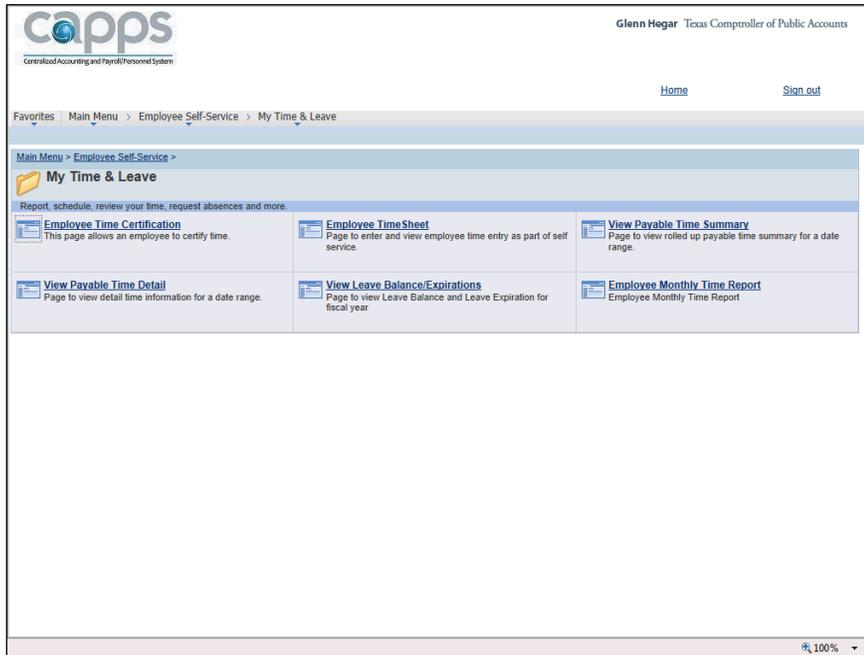
To make up the Optional Holiday the employee works on San Jacinto Day.

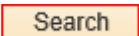


Step	Action
1.	Click the My Time & Leave button. <div data-bbox="440 1100 769 1199" style="border: 2px solid red; padding: 5px; text-align: center; margin: 10px 0;"> My Time & Leave </div>

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Step	Action
2.	Click the Employee TimeSheet link. 
3.	Click the Search button. 

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Home Sign out

Favorites Main Menu > Employee Self-Service > My Time & Leave > Employee Timesheet

New Window

Employee Timesheet

Name: Employee FHG Company/Pay Group: 212 / HRM State Service Effective Date: 11/06/2005
 Empl ID: 0000030000 0 Business Unit: 21200
 Job Title: Tech Department: 1300 Manager ID: 000000009 Manager ABCD

Leave Balances

Leave Balances	Annual Leave	Sick	FLSA Overtime	Regular Comptime	Holiday Comptime	Optional Holiday	Sick Leave Pool	Administrative Leave	Extended Sick Leave	Emergency Fitness Leave	Wellness Leave	Spec
Current	79.25	76.50	6.00	14.50	11.00	0.00	0.00	32.00	100.00	0.00	0.00	
Pending Approval	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Available	79.25	72.50	6.00	14.50	11.00	0.00	0.00	32.00	100.00	0.00	0.00	

From Sunday 03/01/2015 to Sunday 03/15/2015

*Time Reporting Code	Time Reporting Code Description	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5	Fri 3/6	Sat 3/7	Sun 3/8	Mon 3/9	Tue 3/10	Wed 3/11	Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Override Reason Code	Labor Account Code
ANLVT	AL Taken	0.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		

Add a New Line for Sunday 03/01/2015 to Sunday 03/15/2015

From Monday 03/16/2015 to Tuesday 03/31/2015

*Time Reporting Code	Time Reporting Code Description	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26	Fri 3/27	Sat 3/28	Sun 3/29	Mon 3/30	Tue 3/31	Override Reason Code	Labor Account Code
ANLVT	AL Taken	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
COMPT	Comp Taken	0.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
REGHR	Reg Hrs Wk	0.00	0.00	0.00	0.00	0.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		

100%

Step	Action
4.	Click the scrollbar to navigate down the page.

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Home Sign out

Favorites Main Menu > Employee Self-Service > My Time & Leave > Employee Timesheet

Leave Balances

Leave Balances	Annual Leave	Sick	FLSA Overtime	Regular Comptime	Holiday Comptime	Optional Holiday	Sick Leave Pool	Administrative Leave	Extended Sick Leave	Emergency Fitness Leave	Wellness Leave	Spec
Current	79.25	76.50	6.00	14.50	11.00	0.00	0.00	32.00	100.00	0.00	0.00	
Pending Approval	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Available	79.25	72.50	6.00	14.50	11.00	0.00	0.00	32.00	100.00	0.00	0.00	

From Sunday 03/01/2015 to Sunday 03/15/2015

*Time Reporting Code	Time Reporting Code Description	Sun 3/1	Mon 3/2	Tue 3/3	Wed 3/4	Thu 3/5	Fri 3/6	Sat 3/7	Sun 3/8	Mon 3/9	Tue 3/10	Wed 3/11	Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Override Reason Code	Labor Account Code
ANLVT	AL Taken	0.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		

Add a New Line for Sunday 03/01/2015 to Sunday 03/15/2015

From Monday 03/16/2015 to Tuesday 03/31/2015

*Time Reporting Code	Time Reporting Code Description	Mon 3/16	Tue 3/17	Wed 3/18	Thu 3/19	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26	Fri 3/27	Sat 3/28	Sun 3/29	Mon 3/30	Tue 3/31	Override Reason Code	Labor Account Code
ANLVT	AL Taken	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
COMPT	Comp Taken	0.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
REGHR	Reg Hrs Wk	0.00	0.00	0.00	0.00	0.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
SICKT	Sick Taken	0.00	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		

Add a New Line for Monday 03/16/2015 to Tuesday 03/31/2015

View Leave Balances Previous Next

E-Sign & Submit

100%

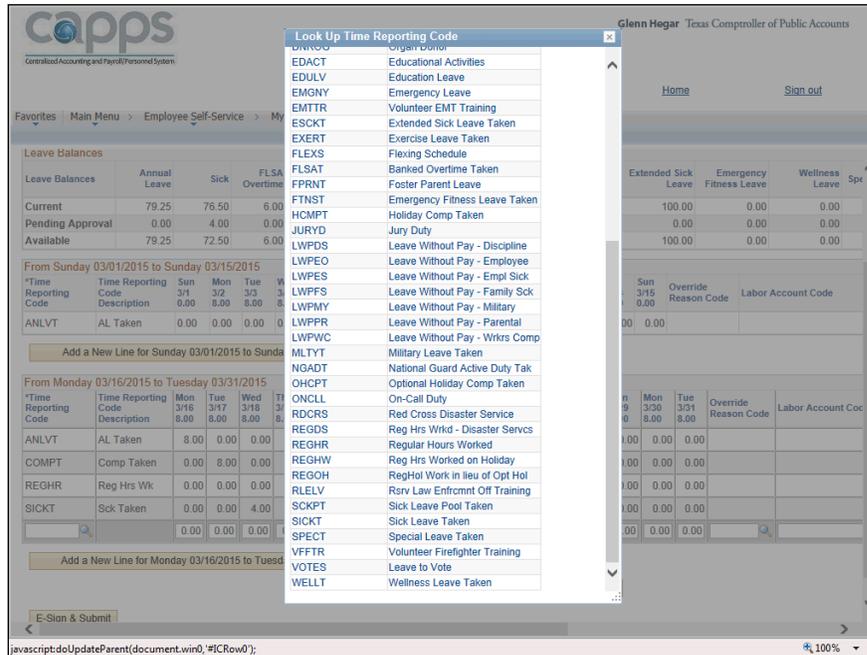
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Step	Action
5.	<p>The employee has to add a new line to enter the Time Reporting Code for the optional holiday.</p> <p>Click the Add a New Line for Monday 03/16/2015 to Tuesday 03/31/2015 button.</p> <p style="border: 1px solid red; padding: 2px; display: inline-block;">Add a New Line for Monday 03/16/2015 to Tuesday 03/31/2015</p>
6.	<p>Click the Look up Time Reporting Code (Alt+5) button.</p> 

Step	Action
7.	Click the scrollbar to navigate down the list.



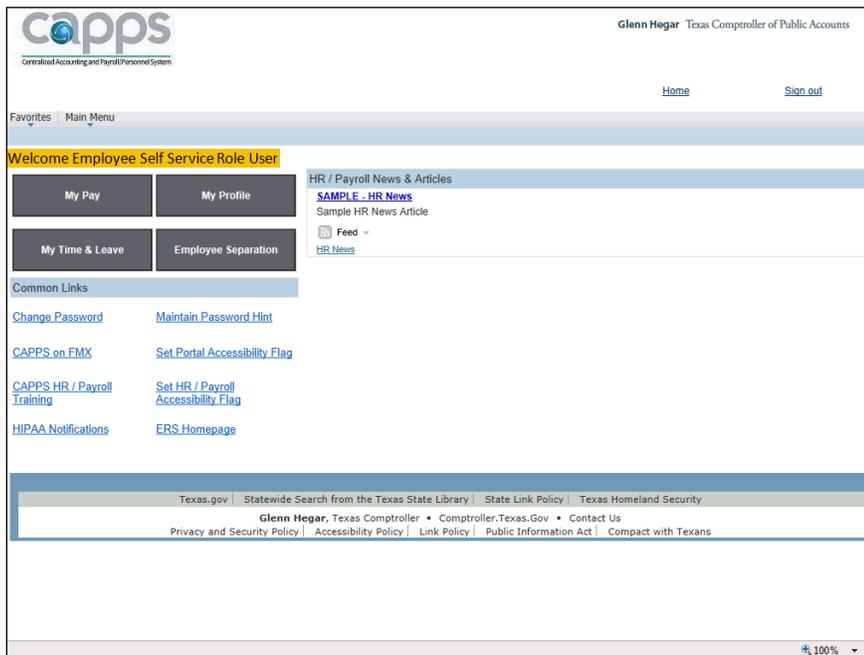
Step	Action
8.	<p>The correct Time Reporting Code for an optional holiday is OHCPT.</p> <p>Click the OHCPT link.</p> <p>OHCPT</p>
9.	<p>Enter the hours into the Tue 3/31 field.</p> <p>Enter "8.00".</p> <p>0.00</p>
10.	<p>Click the E-Sign & Submit button.</p> <p>E-Sign & Submit</p>
11.	<p>Click the OK button.</p> <p>OK</p>
12.	<p>Notice the Optional Holiday information at the top of the timesheet with the Leave Balances.</p> <p>It shows the 8 hours of optional holiday time in a pending approval status with an available balance of -8.00 hours. Before the end of the fiscal year, the employee will have to work on a holiday to replace the time, or pay for the time taken. The optional holiday balance can only be negative until the end of the fiscal year.</p>

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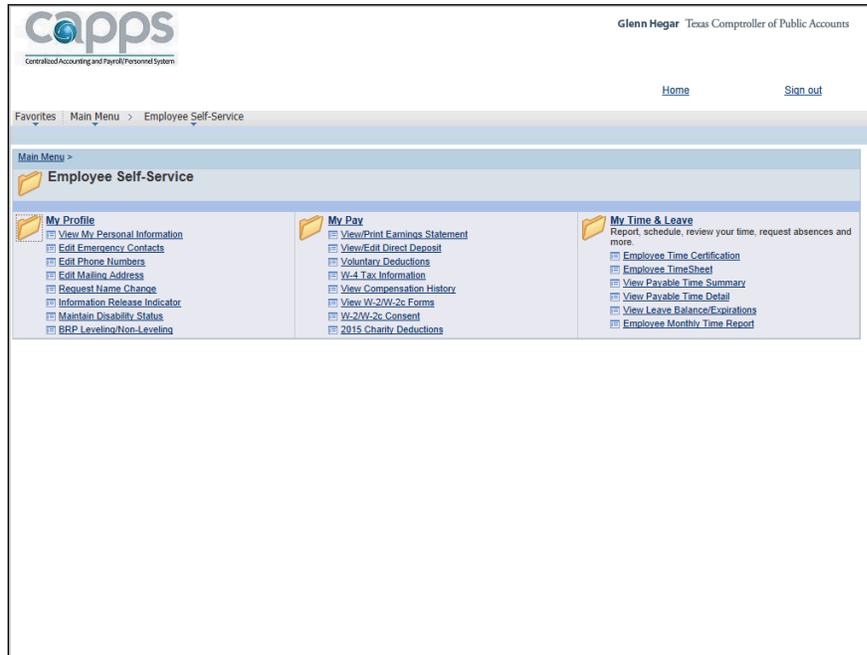
EUT Course

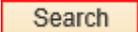
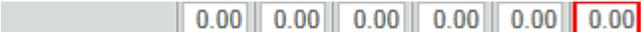
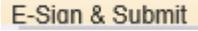
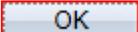
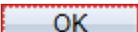


Step	Action
13.	Employees also have the option to work the holiday and have a positive balance and take another optional holiday off at a later time. At the end of the fiscal year the balance must be zero. If the balance is a positive number the employee will lose the hours.



Step	Action
14.	<p>The employee worked on San Jacinto Day so the -8 balance will move back to zero.</p> <p>Click the My Time & Leave button.</p> <div style="border: 2px solid red; padding: 5px; display: inline-block; background-color: #444; color: white; margin: 10px 0;">My Time & Leave</div>



Step	Action
15.	Click the Employee TimeSheet link. 
16.	Click the Search button. 
17.	Click the Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015 button. 
18.	Enter the desired information into the Time Reporting Code field. Enter " REGOH ".
19.	Enter the desired information into the Tue 4/21 8.00 field. Enter " 8 ". 
20.	Click the E-Sign & Submit button. 
21.	Click the OK button. 
22.	Click the OK button. 

Step	Action
23.	Click the OK button. 
24.	After the hours have been approved by the manager and have been process through Time Administration the Optional Holiday hours show 0.
25.	Congratulations! You have successfully completed this lesson. End of Procedure.

Allocating Time Worked to a Labor Account Code

Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 15: Allocating Time Worked to a Labor Account Code

Procedure

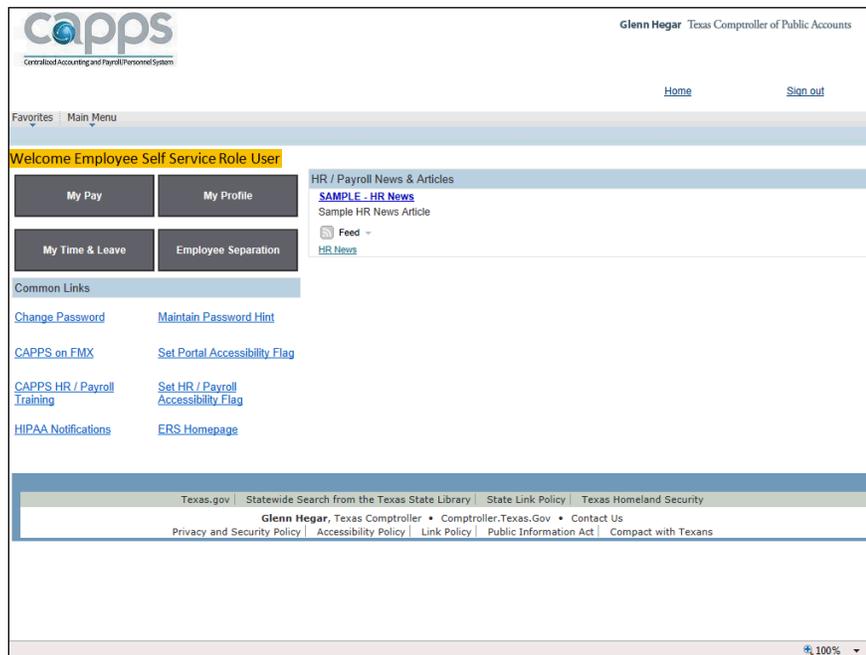
Employee AAA's manager has assigned him/her to work on two projects (Project 1 and Project 2) in the same work week and has requested that the employee use a Labor Account Code.

In this lesson you will learn how to allocate hours worked to Project 1. In the next lesson you will learn how to add the additional hours worked during the week for Project 2.

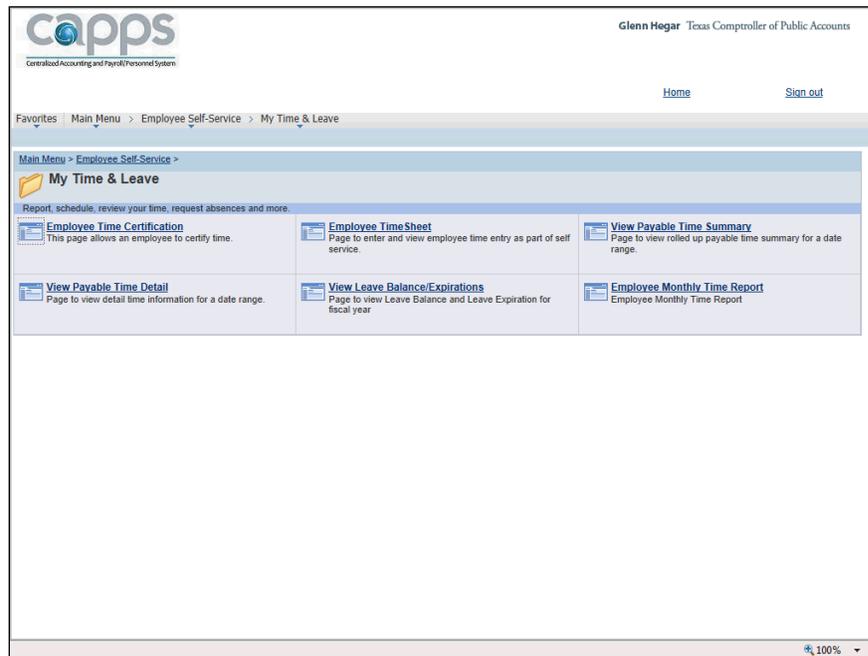
Hours worked:

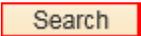
4/6 & 4/7 - Project 1 (Regular Scheduled Hours)

4/8 & 4/9 - Project 2 (Regular Scheduled Hours) *Next Lesson*



Step	Action
1.	Click the My Time & Leave button. 



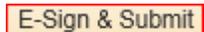
Step	Action
2.	Click the Employee TimeSheet link. 
3.	The Timesheet defaults to the first day of the current month. It is recommended that you use the first day of the month when accessing the Timesheet. This will display the entire month on the timesheet.
4.	Click the Search button. 

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Step	Action
5.	<p>Labor Account Codes (LAC) are used to track hours worked to a specific work assignment, such as a project.</p> <p>As you learned earlier in this course, every time you use a different TRC to report hours worked or leave time taken, you must use a separate line within that grid. You follow this same rule when allocating hours to a Labor Account Code. Each unique LAC will also require its own separate line on the timesheet grid.</p>
6.	<p>Click the Add a New Line for ... button.</p> <p>Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015</p>
7.	<p>Click the Look up Time Reporting Code (Alt+5) button.</p> <p></p>
8.	<p>Click in the Time Reporting Code field.</p> <p><input type="text"/></p>
9.	<p>To shorten your search, enter the first few letters of the Time Reporting Code field.</p> <p>Enter "reg".</p> <p><input type="text"/></p>
10.	<p>Click the Look Up button.</p> <p>Look Up</p>
11.	<p>Click the REGHR link.</p> <p>REGHR</p>
12.	<p>Click in the Mon 4/6 field.</p> <p><input type="text" value="0.00"/></p>
13.	<p>Enter the hours worked into the Mon 4/6 field.</p> <p>Employee AAA worked his/her scheduled hours. Enter "8".</p> <p><input type="text" value="0.00"/></p>
14.	<p>Click in the Tue 4/7 field.</p> <p><input type="text" value="0.00"/></p>
15.	<p>Enter the hours worked into the Tue 4/7 field.</p> <p>Employee AAA worked his/her scheduled hours. Enter "8".</p> <p><input type="text" value="0.00"/></p>

Step	Action
16.	Click the scrollbar to navigate across the page.
17.	Click the Look up Labor Account Code (Alt+5) button. 
18.	NOTE: Applicable LAC for your agency will be listed in the search results. Your manager should provide you with the LAC information that he/she assigned you to work. If you do not know what LAC to select, do not select one, and refer to your manager for assistance. In this example, click the Project 1 link. 
19.	Click the scrollbar to navigate back across the page.
20.	Click the scrollbar to navigate down the page.
21.	Click the E-Sign & Submit button. 
22.	Click the OK button. 
23.	Congratulations! You have successfully completed this lesson. End of Procedure.

Allocating Time Worked to Multiple Labor Account Codes

Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 16: Allocating Time Worked to Multiple Labor Account Codes

Procedure

In the previous scenario you learned how to allocate hours worked to Project 1. In this lesson you learn how to add the additional hours worked during the week for Project 2.

Employee AAA's manager has assigned him/her to work on two projects (Project 1 and Project 2) in the same work week.

Hours worked:

4/6 & 4/7 - Project 1 (Regular Scheduled Hours) *Previous Lesson*

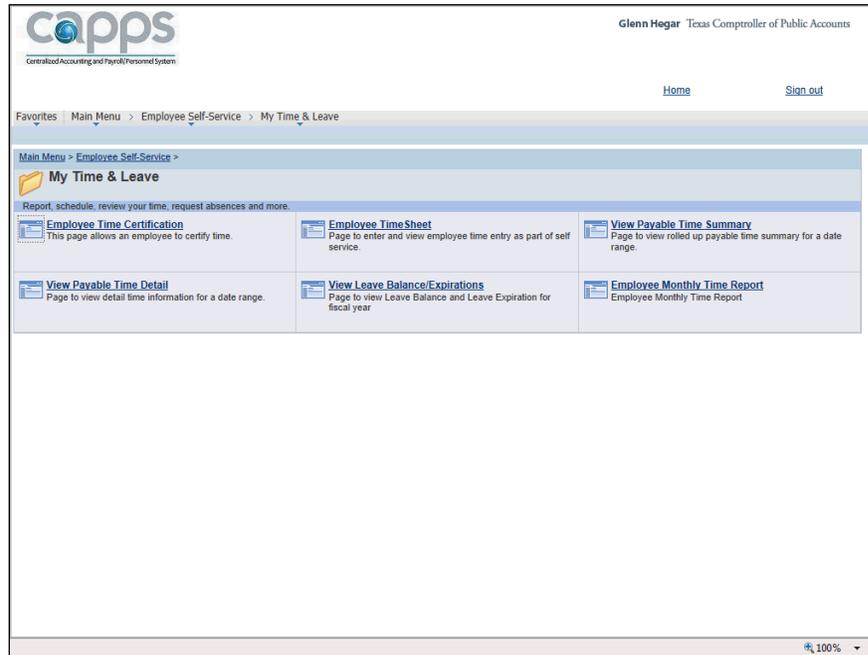
4/8 & 4/9 - Project 2 (Regular Scheduled Hours)

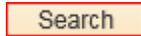
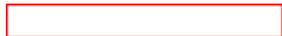
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Step	Action
1.	Click the My Time & Leave button. <div data-bbox="344 1102 673 1201" style="border: 2px solid red; padding: 5px; text-align: center; margin: 10px 0;"> My Time & Leave </div>

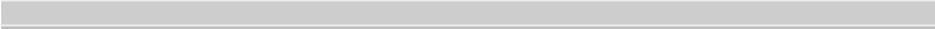


Step	Action
2.	Click the Employee TimeSheet link. 
3.	Click the Search button. 
4.	Labor Account Codes (LAC) are used to track hours worked to a specific work assignment, such as a project. As you learned earlier in this course, every time you use a different TRC to report hours worked or leave time taken, you must use a separate line within that grid. You follow this same rule when allocating hours to a Labor Account Code. Each unique LAC will also require its own separate line on the timesheet grid.
5.	Click the Add a New Line for ... button. 
6.	Click the Look up Time Reporting Code (Alt+5) button. 
7.	Click in the Time Reporting Code field. 

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Step	Action
8.	To shorten your search, enter the first few letters of the Time Reporting Code field. Enter "re". <input type="text"/>
9.	Click the Look Up button. 
10.	Click the REGHR link. 
11.	Enter the total hours worked on Project 2 into the Wed 4/8 field. In this example you worked all of your eight scheduled hours. Enter "8". 
12.	Click in the Thu 4/9 field. 
13.	Enter the total hours worked on Project 2 into the Thurs 4/9 field. In this example you worked all of your eight scheduled hours. Enter "8". 
14.	Click in the scrollbar to navigate across the page. 
15.	Click the Look up Labor Account Code (Alt+5) button. 
16.	NOTE: Applicable LAC for your agency will be listed in the search results. Your manager should provide you with the LAC information that he/she assigned you to work. If you do not know what LAC to select, do not select one, and refer to your manager for assistance. In this example, click the Project 2 link. 
17.	Click the scrollbar to navigate back across the page.
18.	Click the scrollbar to navigate down the page.

Step	Action
19.	Click the E-Sign & Submit button. 
20.	Click the OK button. 
21.	<p>You just learned how to allocate hours worked to two separate Labor Account Codes (Project 1 and Project 2).</p> <p>What if you worked only partial hours toward your LAC. How would you enter your time?</p> <p>For example: Employee AAA works an 8 hour scheduled day. Only for 3 of those hours he/she worked on Project 1, the remaining 5 hours he/she worked his/her regular job which doesn't require a LAC to be entered in the system.</p> <p>In this case, the employee will need to enter his/her hours on two separate lines on the Timesheet grid.</p> <p><u>Line 1:</u> Employee AAA will add a new line, enter the TRC REGHR, enter the 3 hours worked on the timesheet, and select the applicable LAC.</p> <p><u>Line 2:</u> Employee AAA will add a new line, enter the TRC REGHR, enter the remaining 5 hours worked, and leave the LAC field blank.</p>
22.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Employee Time Certification

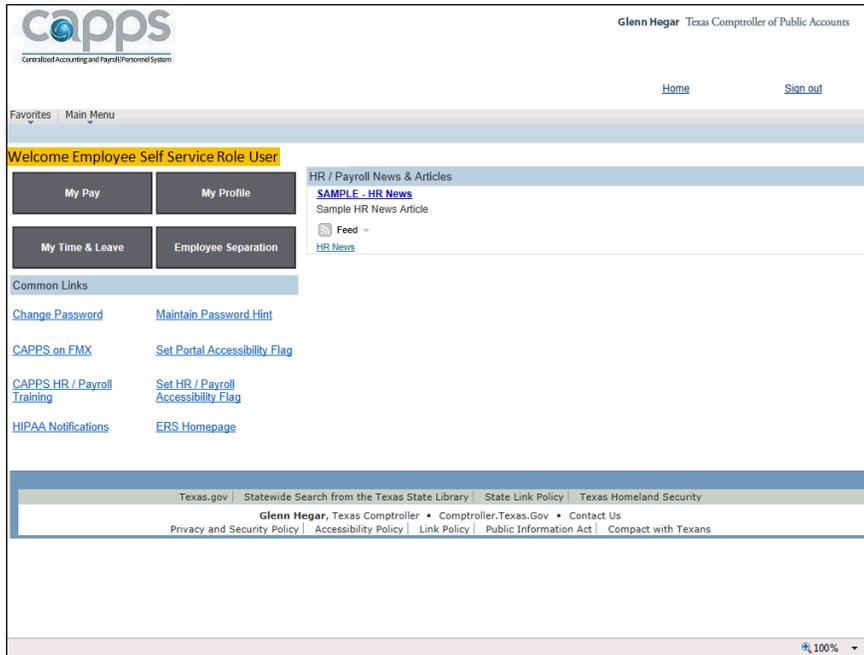
Section 1 - Lesson 3 Exception Time Reporters Exercises - Scenario 17: Employee Time Certification

Procedure

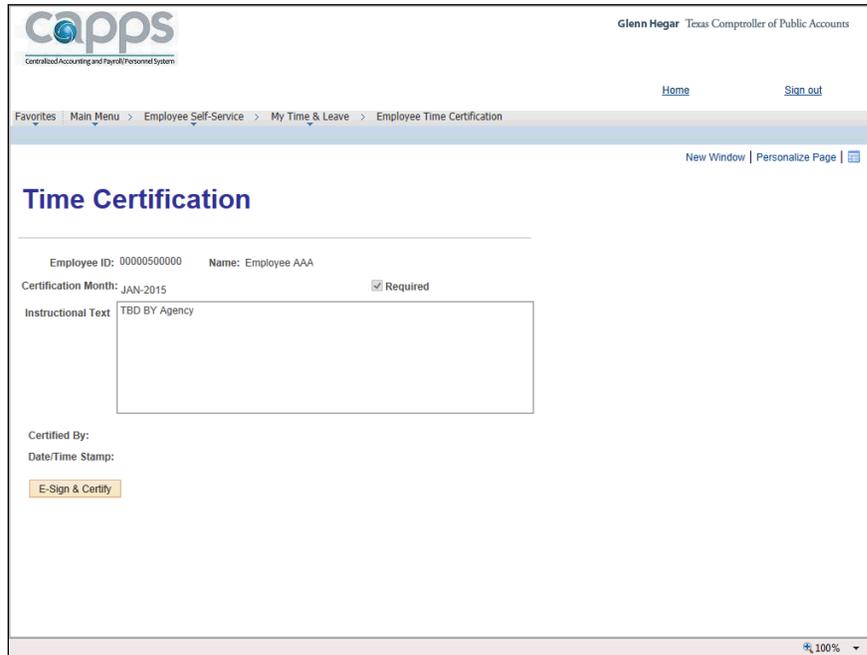
In this lesson, you will learn how to certify time using the Time Certification page.

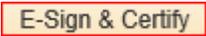
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Step	Action
1.	Click the My Time & Leave button. 
2.	Agencies can instruct their employees to certify their time by accessing the Time Certification page and clicking on E-Sign & Certify. Click the Employee Time Certification link. 
3.	Information contained in the Instructional Text will vary per Agency.



Step	Action
4.	Click the E-Sign & Certify button. 
5.	Click the OK button. 
6.	Notice how the save action marked the Time Certification with a Date/Time Stamp. Note: Employees can also certify their time by using the Time Certification link at the bottom of their timesheet.
7.	Congratulations, you have completed this lesson. End of Procedure.

Lesson 5 - View Time and Leave Balances

Section 1, Lesson 5

View Time and Leave Balances

View Leave Balances/Expirations

Section 1 - Lesson 5 Exercises - Scenario 1: View Leave Balances/Expirations

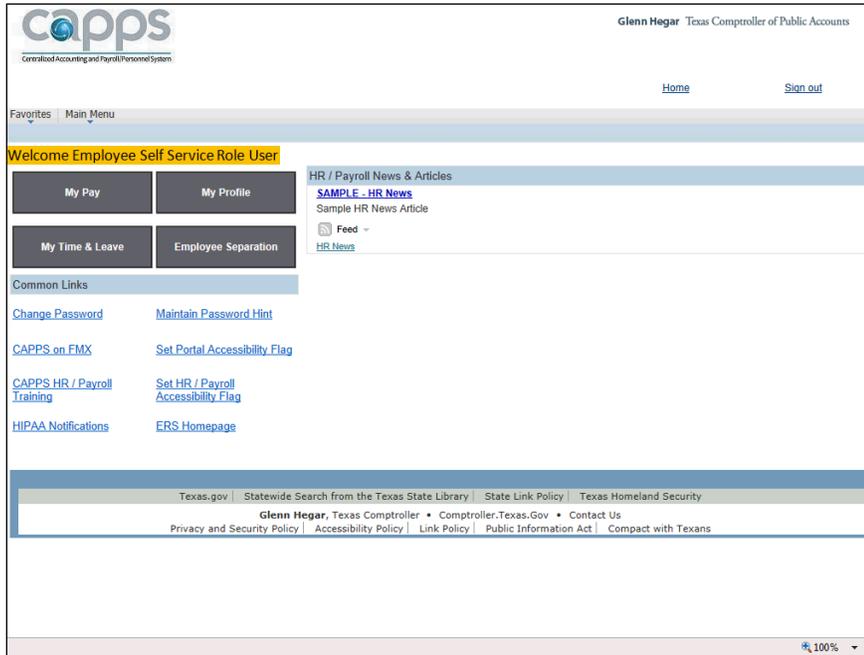
Procedure

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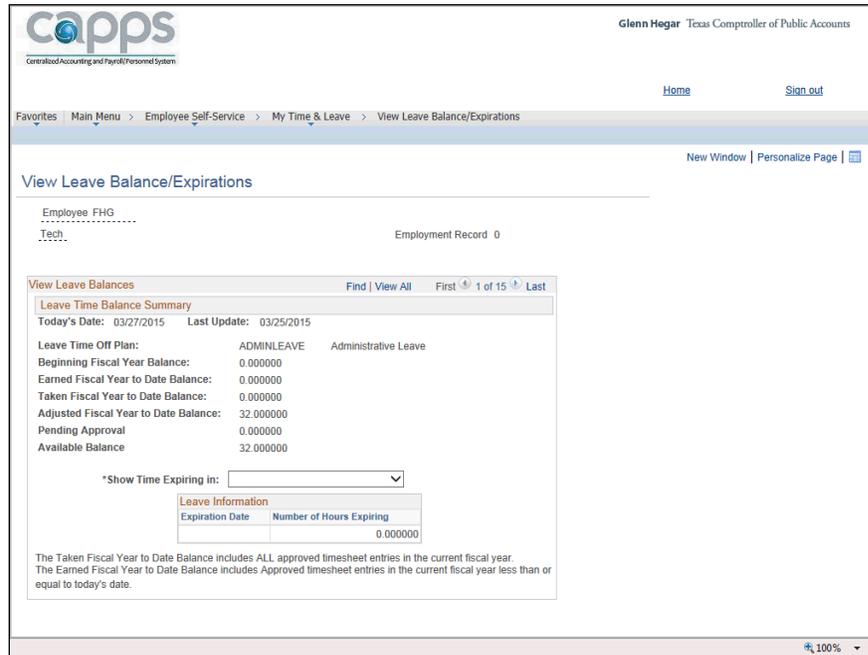
EUT Course



In this lesson, you will learn how to view Leave Balances and Expirations.



Step	Action
1.	Click the My Time & Leave button. 
2.	Click the View Leave Balance/Expirations link. 



Step	Action
3.	Click the Show next row (Alt+.) button. 
4.	Click the Show next row (Alt+.) button. 
5.	Click the Show next row (Alt+.) button. 
6.	Click the Show next row (Alt+.) button. 
7.	Click the Show next row (Alt+.) button. 
8.	Click the Show previous row (Alt+.) button. 
9.	Click the Show Time Expiring in list. 

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cappps
Centralized Accounting and Payroll/Personnel System

Glenn Hegar Texas Comptroller of Public Accounts

Home Sign out

Favorites Main Menu > Employee Self-Service > My Time & Leave > View Leave Balance/Expirations

New Window | Personalize Page

View Leave Balance/Expirations

Employee FHG
Tech
Employment Record 0

View Leave Balances Find | View All First 7 of 15 Last

Leave Time Balance Summary
Today's Date: 03/27/2015 Last Update: 03/25/2015

Leave Time Off Plan:	EXTDSICKLV	Extended Sick Leave
Beginning Fiscal Year Balance:	0.000000	
Earned Fiscal Year to Date Balance:	0.000000	
Taken Fiscal Year to Date Balance:	0.000000	
Adjusted Fiscal Year to Date Balance:	100.000000	
Pending Approval	0.000000	
Available Balance	100.000000	

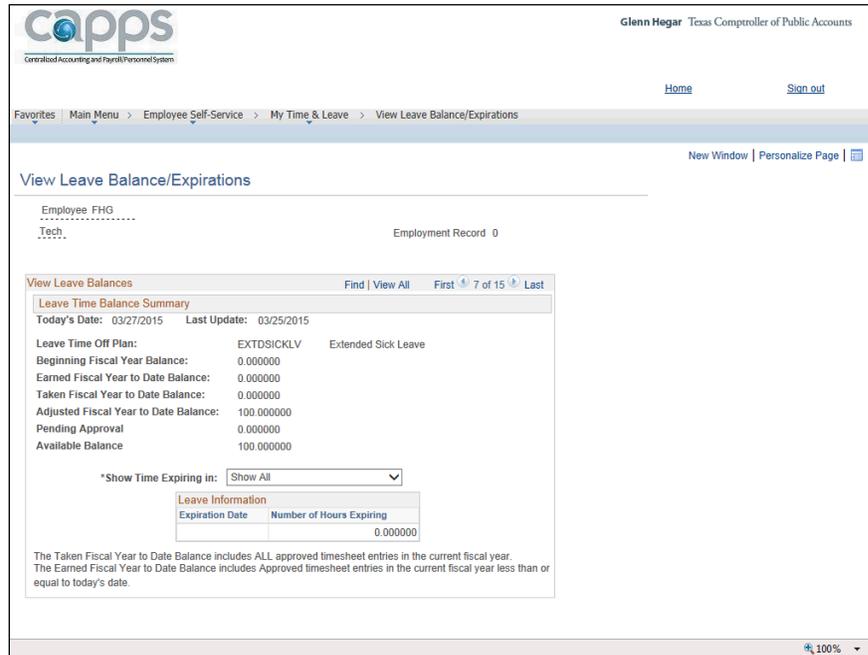
*Show Time Expiring in:

Next 30 Days	
Next 90 Days	
One Year	
Show All	00000000

The Taken Fiscal Year to Date Balance includes ALL approved timesheet entries in the current fiscal year.
The Earned Fiscal Year to Date Balance includes Approved timesheet entries in the current fiscal year less than or equal to today's date.

100%

Step	Action
10.	<p>We chose the Show All option to view all of the time that will expire for the Extended Sick Leave category.</p> <p>Click the Show All list item.</p> <p>Show All</p>



View Leave Balance/Expirations

Employee FHG
Tech

Employment Record 0

View Leave Balances Find | View All First 7 of 15 Last

Leave Time Balance Summary
Today's Date: 03/27/2015 Last Update: 03/25/2015

Leave Time Off Plan: EXTDSICKLV Extended Sick Leave

Beginning Fiscal Year Balance: 0.000000

Earned Fiscal Year to Date Balance: 0.000000

Taken Fiscal Year to Date Balance: 0.000000

Adjusted Fiscal Year to Date Balance: 100.000000

Pending Approval: 0.000000

Available Balance: 100.000000

*Show Time Expiring in: Show All

Leave Information	
Expiration Date	Number of Hours Expiring
	0.000000

The Taken Fiscal Year to Date Balance includes ALL approved timesheet entries in the current fiscal year.
The Earned Fiscal Year to Date Balance includes Approved timesheet entries in the current fiscal year less than or equal to today's date.

Step	Action
11.	The Number of Hours Expiring for the Extended Sick Leave are zero. Click the Show next row (Alt+.) button. 
12.	When we look at the Holiday Comp balance, we can see below that three hours of Holiday Comp will expire on June 19, 2015 and eight hours will expire on August 27, 2015.
13.	Congratulations! You have successfully completed this lesson. End of Procedure.

Employee Monthly Time Report

Section 1 - Lesson 5 Exercises - Scenario 2: Employee Monthly Time Report

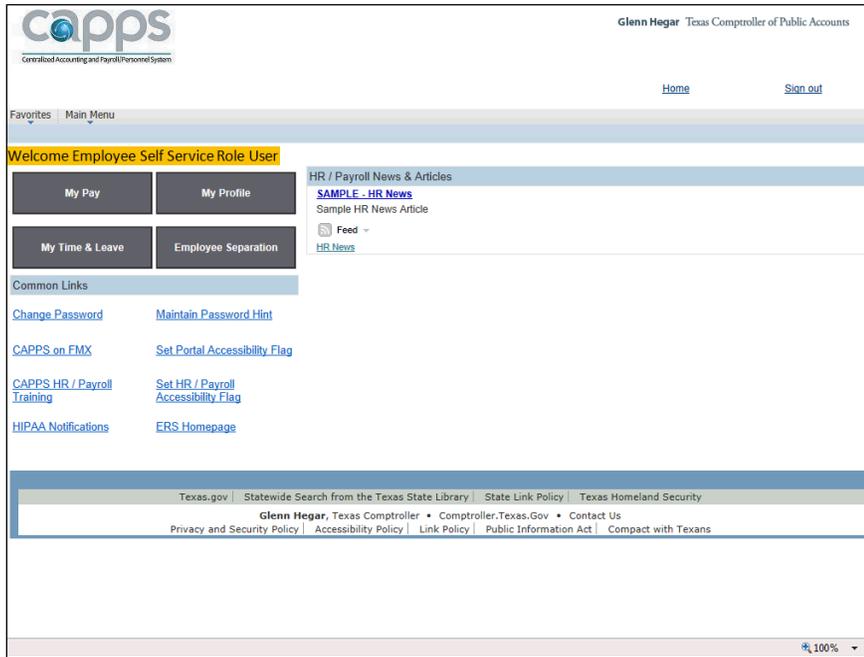
Procedure

This report will display beginning and ending balances for all types of leave.

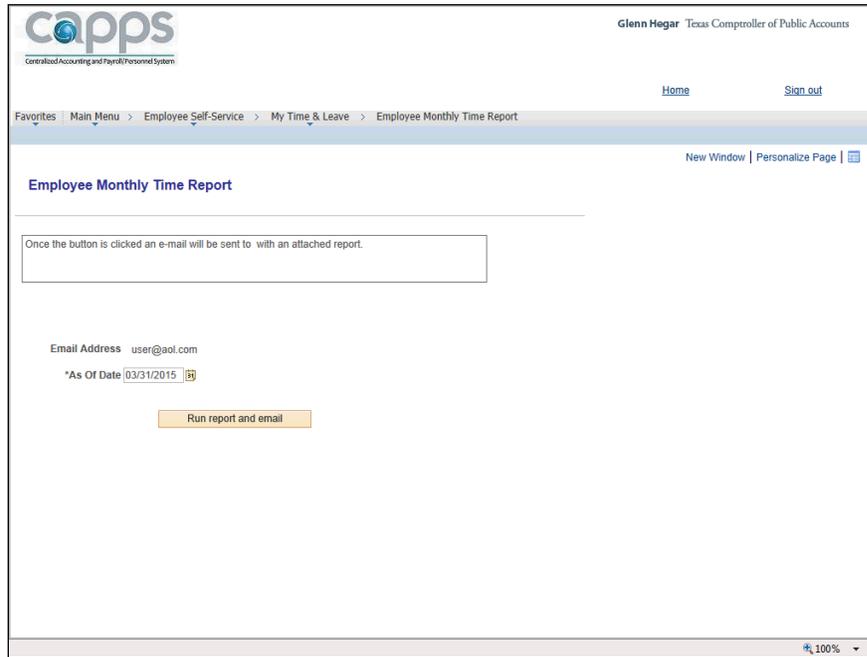
It can be run any time during the current month for the previous month's data.

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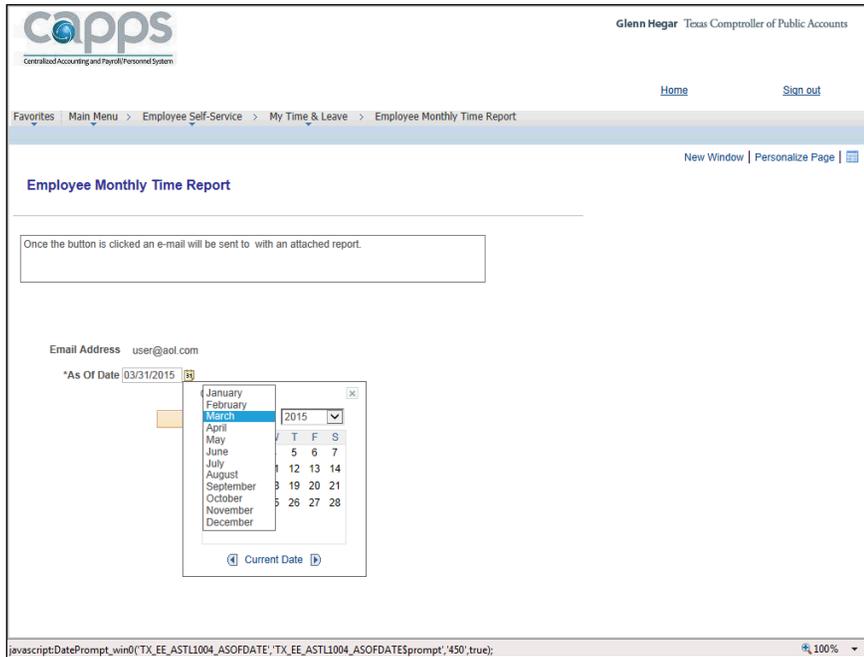
EUT Course



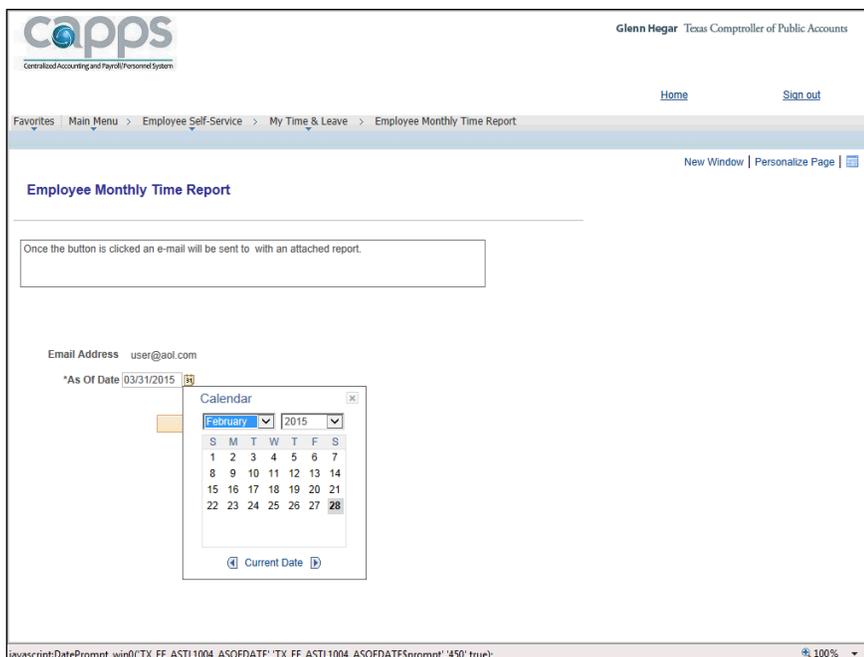
Step	Action
1.	Click the My Time & Leave button. 
2.	Click the Employee Monthly Time Report link. 

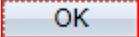


Step	Action
3.	Click the Choose a date (Alt+5) button. 
4.	Click the drop down list. 



Step	Action
5.	Click the February list item. February



Step	Action
6.	Click the 28 link. 
7.	Click the Run report and email button. 
8.	Click the OK button. 
9.	The report displays beginning and ending balances for all types of leave, leave accrued/earned, leave expiring within the next 3 months, current annual leave balances, projected accruals, carry over maximum and hours converting to sick leave. It can be run any time during the current month for the previous month's data.
10.	Congratulations! You have successfully completed this lesson. End of Procedure.

Section 2 - eProfile

Section 2 - eProfile

Section 2 - eProfile has 1 lesson:

- Lesson 1 - eProfile Human Resources

Lesson 1 - eProfile Human Resources

Section 2, Lesson 1

eProfile Human Resources

View My Personal Information

Section 2 - Lesson 1 Exercises - Scenario 1: View My Personal Information

Procedure

View **My Personal Information** is a central location where users can view, add, edit, and in some cases delete personal information. In this lesson, the user will learn how to complete the following tasks:

1. View your Mailing Address
2. View your Phone Number

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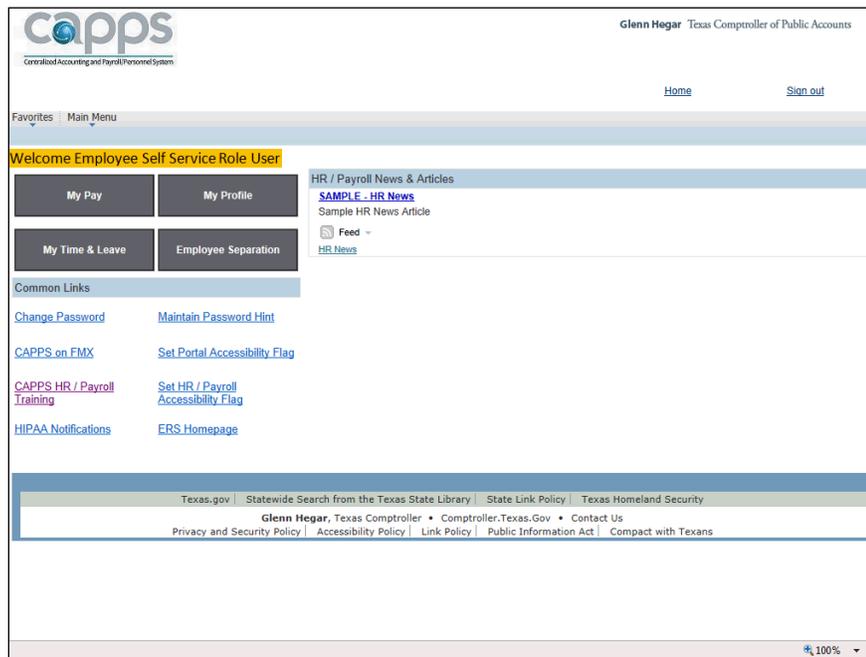
EUT Course

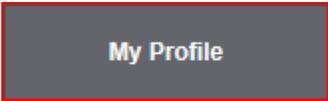


3. View your Emergency Contact
4. View your Email Address
5. View your Information Release Indicators
6. View your Disability Indicator Status

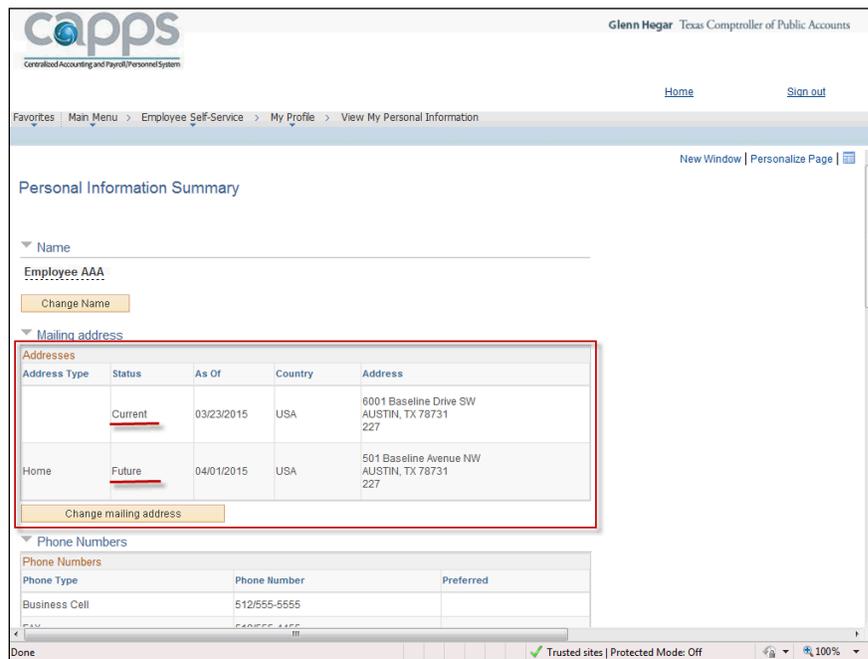
Although it is possible to add, edit, or delete personal information from the 'My Personal Information' page, how to specifically perform each task for the areas listed above is included in the remaining topics in this section.

Note: for security purposes real names, addresses, phone numbers, and other confidential information has been changed or removed from this training lesson.



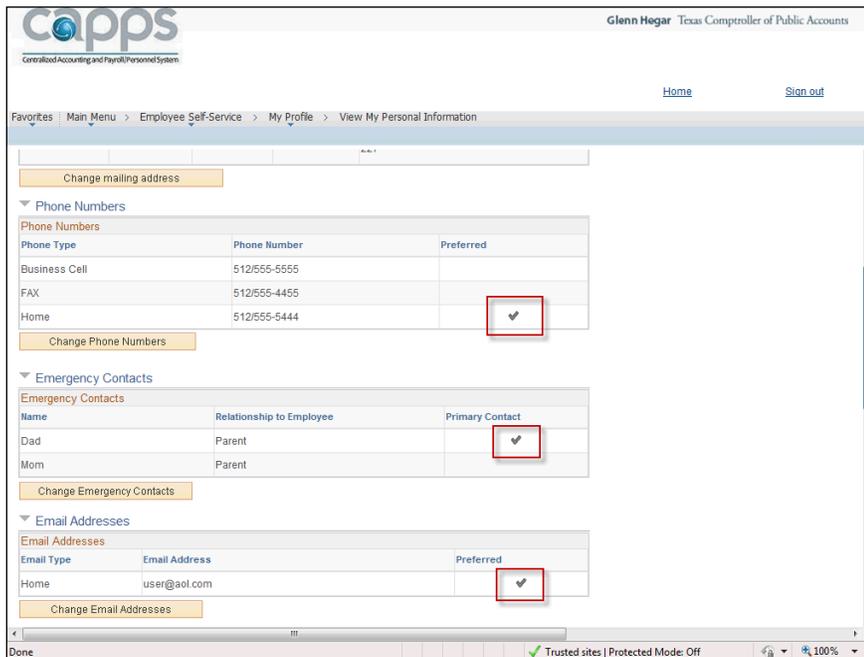
Step	Action
1.	Click the My Profile button. 
2.	Click the View My Personal Information link. 

Step	Action
3.	<p>The top portion of the 'My Personal Information' page displays the employee's name and address information.</p> <p>Note: Employee AAA has two addresses listed. The current address is 6001 Baseline Drive SW, Austin, TX. On April 1, 2015 the new address will be 501 Baseline Avenue NW, Austin, TX.</p> <p>Employee AAA knew he/she was going to move on April 1, 2015. Therefore he/she added the information to CAPPS with a future date. It was not necessary for Employee AAA to wait until he/she actually moved before processing his/her address change.</p> <p>To learn how to change an address, refer to Exercise, Scenario 4: Edit Mailing Address</p>



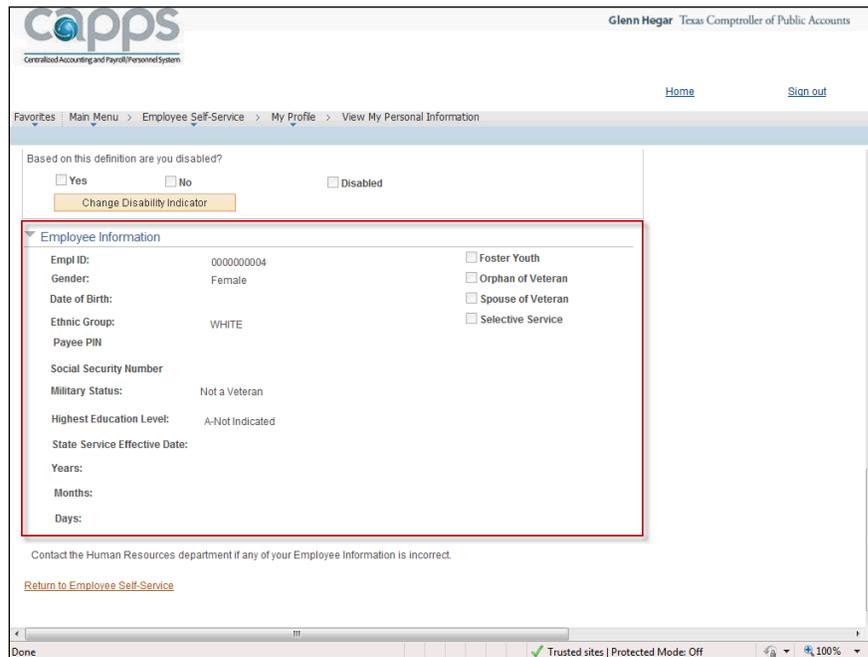
Step	Action
4.	Click the scrollbar to navigate down the page.

Step	Action
5.	<p>Next, the 'My Personal Information' page displays the employee's Phone Numbers, Emergency Contact information, and Email Addresses.</p> <p>Each section contains a check mark indicating what should be considered the employee's Preferred or Primary information to be used.</p>



Step	Action
6.	Click the scrollbar to navigate down the page.
7.	<p>Next, the 'My Personal Information' page displays the employee's Information Release Indicator selections and if the employee filled out the Disability Indicator information.</p> <p>Employee AAA has opted to only release their emergency contact information to the public and not to release any disability information.</p> <p>Note: Selecting a Disability Indicator is not required. This function is completely voluntary on behalf of the employee.</p>
8.	Click the scrollbar to navigate down the page.

Step	Action
9.	<p>The bottom portion of the 'My Personal Information' page displays the employee's personal information, such as: Employee ID (Empl ID), Gender, Social Security Number, etc.</p> <p>Note: Employee confidential information has been removed from this page.</p>



Step	Action
10.	<p>Click the Return to Employee Self-Service link.</p> <p>Return to Employee Self-Service</p>
11.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Edit Emergency Contacts

Section 2 - Lesson 1 Exercises - Scenario 2: Edit Emergency Contacts

Procedure

In this lesson you will learn how to:

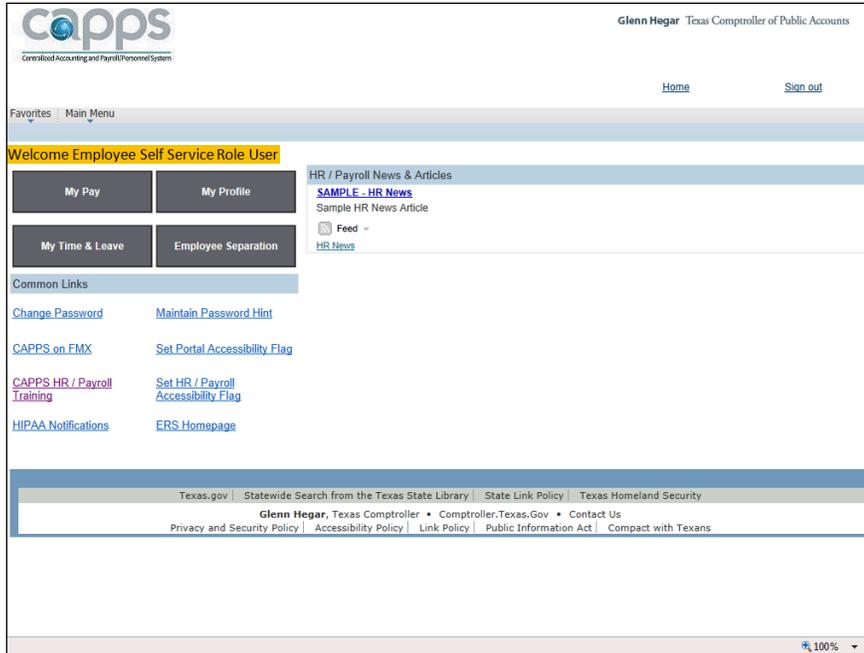
1. Edit an existing emergency contact

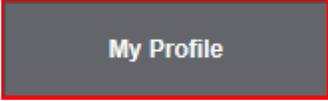
CAPPS HR/PAYROLL

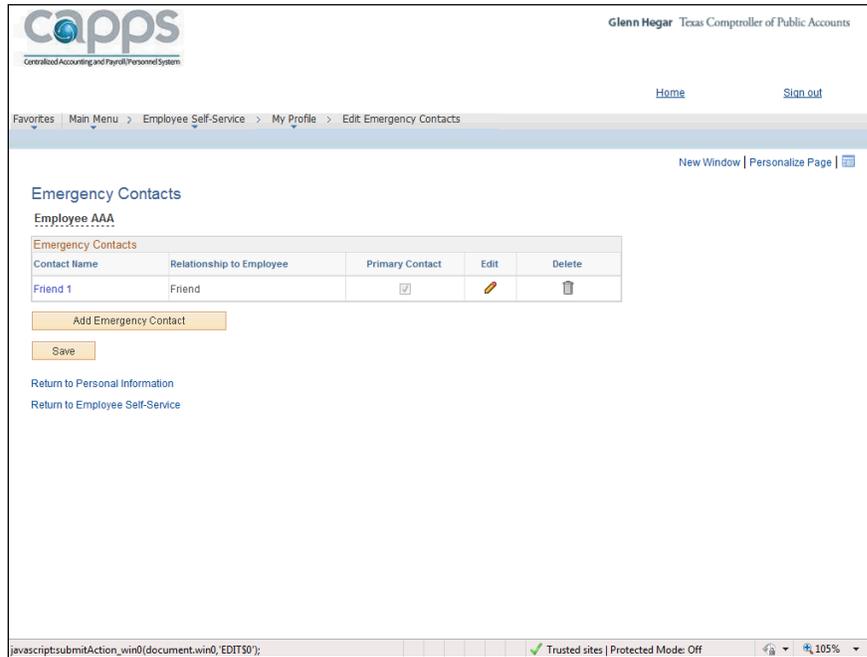
EUT Course



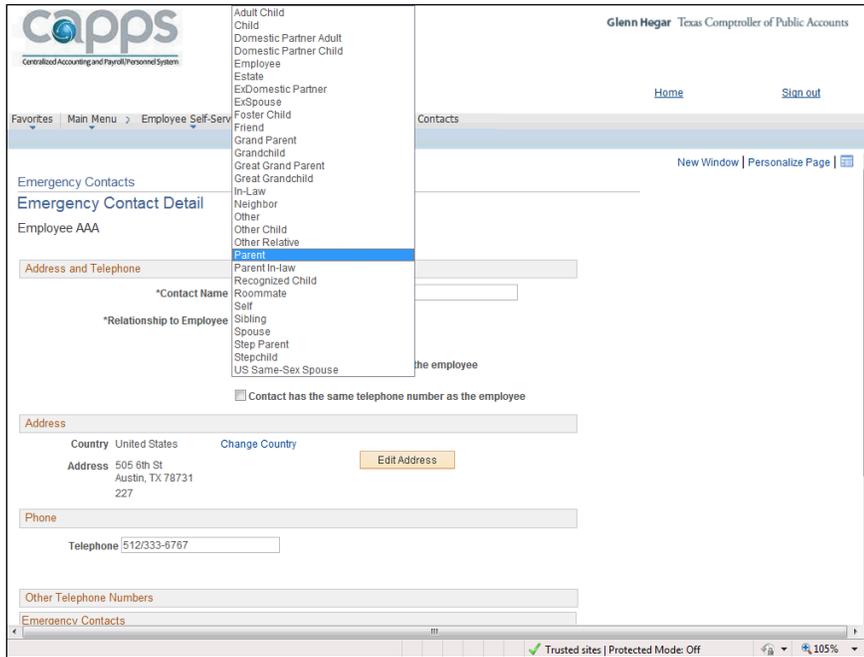
2. Add an additional emergency contact



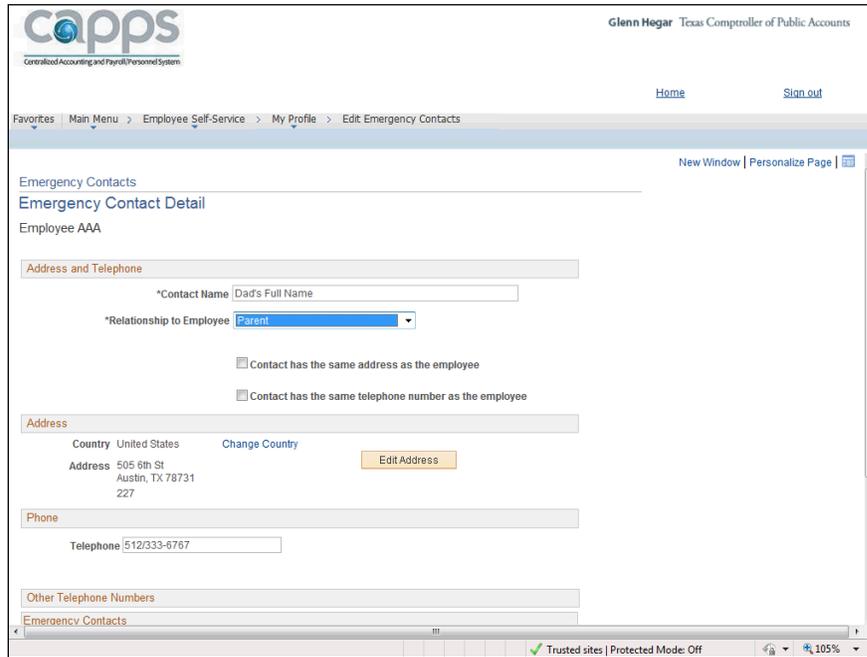
Step	Action
1.	Click the My Profile button. 
2.	Click the Edit Emergency Contacts link. 



Step	Action
3.	<p>1. Edit an existing Emergency Contact</p> <p>In this lesson you will learn how to change your existing contact information to a new emergency contact person.</p> <p>(Changing Friend 1 to Dad)</p> <p>Click the Edit button.</p> 
4.	<p>Click in the Contact Name field.</p> <p>Friend 1</p>
5.	<p>Press [Delete].</p>
6.	<p>Enter the desired information into the Contact Name field. Enter "Dad's Full Name".</p>
7.	<p>Click the Relationship to Employee list.</p> <p>Friend</p>



Step	Action
8.	Click the Parent list item. 
9.	Check the applicable box if the information is the same as the users. This will duplicate the information for the emergency contact.



Emergency Contact Detail
Employee AAA

Address and Telephone

*Contact Name Dad's Full Name

*Relationship to Employee Parent

Contact has the same address as the employee

Contact has the same telephone number as the employee

Address

Country United States [Change Country](#)

Address 505 6th St
Austin, TX 78731
227

[Edit Address](#)

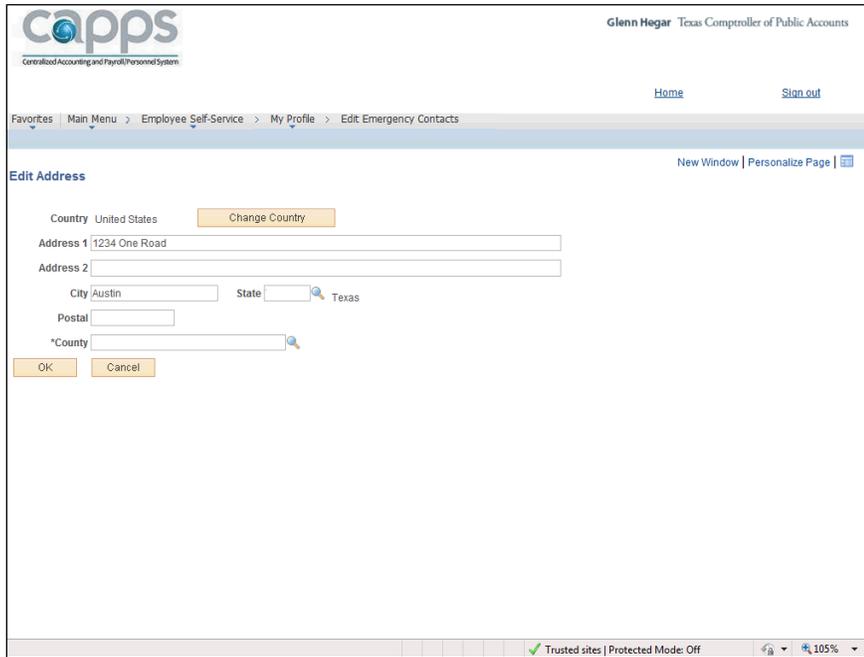
Phone

Telephone 512/333-6767

Other Telephone Numbers

[Emergency Contacts](#)

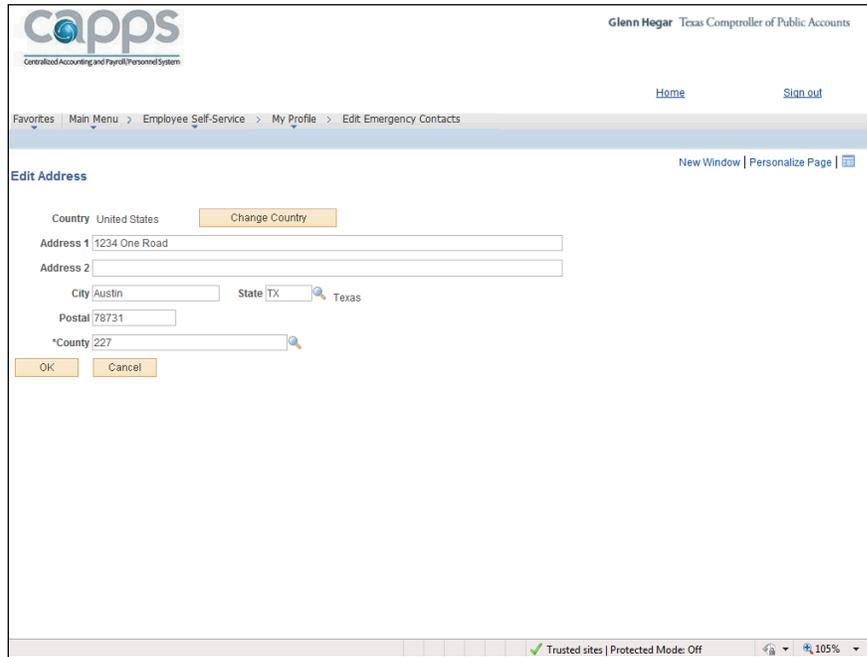
Step	Action
10.	If the information is different it will have to be entered manually. Click the Edit Address button. 
11.	Click in the Address 1 field.
12.	Enter the applicable information into the Address 1 field. In this example use 1234 One Road. Enter " 1234 One Road ".

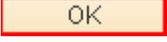


The screenshot shows the 'Edit Address' form in the CAPPS system. The form is titled 'Edit Address' and includes the following fields and buttons:

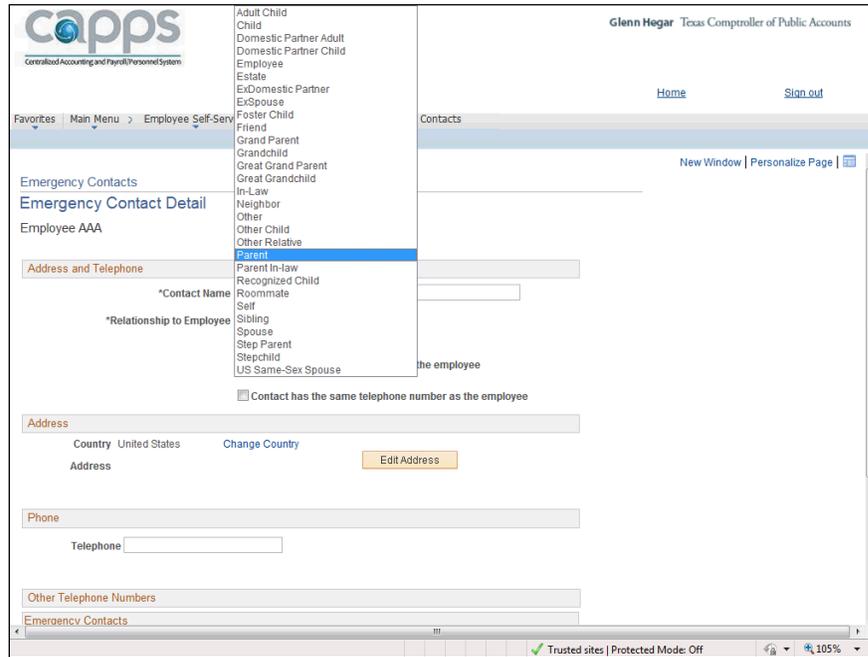
- Country: United States (with a 'Change Country' button)
- Address 1: 1234 One Road
- Address 2: (empty)
- City: Austin
- State: Texas
- Postal: (empty)
- County: (empty)
- Buttons: OK, Cancel

Step	Action
13.	<p>Enter the applicable information into the City field.</p> <p>In this example use Austin.</p> <p>Enter "Austin".</p> <p>OK</p>
14.	<p>Enter the applicable information into the State field.</p> <p>In this example use Texas. Enter "TX".</p> <p>OK</p>
15.	<p>Enter the applicable information into the Postal field.</p> <p>In this example use 78731. Enter "78731".</p> <p>OK</p>
16.	<p>Enter the applicable information into the County field.</p> <p>In this example use 227 for Travis County. Enter "227".</p> <p>OK</p>



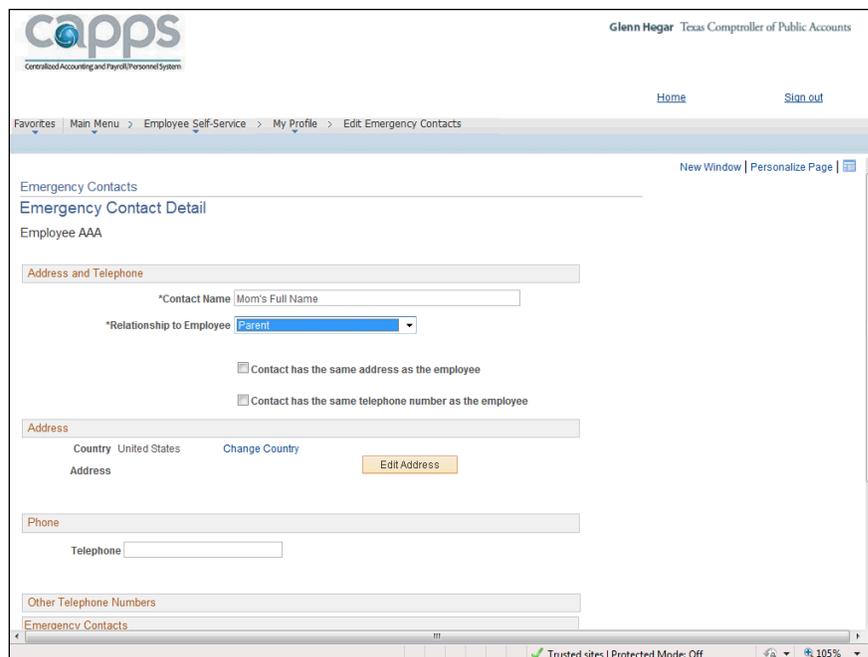
Step	Action
17.	Click the OK button. 
18.	Click the scrollbar to navigate down the page.
19.	Click in the Telephone field. 
20.	Press [Delete] .
21.	Enter the desired information into the Telephone field. Enter " 512/555-1111 ". Telephone 
22.	Click the scrollbar to navigate down the page.
23.	Remember to click the Save button before navigating to a different page. If you do NOT click the Save button the information will be lost. Click the Save button. 
24.	The system will confirm the information was saved successfully. Click the OK button. 

Step	Action
25.	<p>Notice how the system saved Dad's information as the Primary Contact. This is because he is the only contact listed. When there is more than one contact listed you may select the person who will be your primary contact.</p> <p>For future changes to this emergency contact select the edit pencil icon.</p> <p>To delete this emergency contact select the garbage can.</p>
26.	<p>2. Add an additional Emergency Contact</p> <p>In this lesson you will learn how to add a second emergency contact.</p> <p>(Adding Mom)</p> <p>Click the Add Emergency Contact button.</p> <div data-bbox="344 915 792 953" style="border: 1px solid red; padding: 2px; display: inline-block;">Add Emergency Contact</div>
27.	<p>Click in the Contact Name field.</p> <div data-bbox="344 1016 1013 1058" style="border: 1px solid gray; height: 20px; width: 412px;"></div>
28.	<p>Enter the desired information into the Contact Name field. Enter "Mom's Full Name".</p>
29.	<p>Click the Relationship to Employee list.</p> <div data-bbox="344 1205 773 1251" style="border: 1px solid gray; padding: 2px;"> Other ▼ </div>



The screenshot shows the 'Emergency Contact Detail' page for 'Employee AAA'. A dropdown menu is open, listing various relationship types. The 'Parent' option is highlighted in blue. The form fields include 'Address and Telephone', 'Address', 'Phone', and 'Other Telephone Numbers'. The browser status bar at the bottom indicates 'Trusted sites | Protected Mode: Off' and a zoom level of 105%.

Step	Action
30.	Click the Parent list item. 



The screenshot shows the 'Emergency Contact Detail' page for 'Employee AAA' after the 'Parent' relationship has been selected. The '*Relationship to Employee' dropdown is now set to 'Parent'. The form fields for 'Address and Telephone', 'Address', 'Phone', and 'Other Telephone Numbers' are visible. The browser status bar at the bottom indicates 'Trusted sites | Protected Mode: Off' and a zoom level of 105%.

CAPPS HR/PAYROLL

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Step	Action
31.	Click the Edit Address button. 
32.	Click in the Address 1 field.
33.	Enter the applicable address information into the Address 1 field. Enter " 4321 Second Street ".
34.	Click in the City field. 
35.	Enter the applicable city information into the City field. Enter " Austin ".
36.	Press [Tab] .
37.	Enter the applicable State information the State field. Enter " TX " for Texas.
38.	Press [Tab] .
39.	Enter the applicable Zip Code information into the Postal field. Enter " 78742 ".
40.	Press [Tab] .
41.	The County field does not accept County names. Use the Look up glass to determine the applicable County number. Click the Look up County button. 
42.	Click the scrollbar to move down the page.
43.	Click the 227 link for Travis County. 
44.	Click the OK button. 
45.	Click the scrollbar to navigate down the page.

Step	Action
46.	Remember to click the Save button before navigating to a different page. If you do NOT click the Save button the information will be lost. Click the Save button. 
47.	The system will confirm the information was saved successfully. Click the OK button. 
48.	Congratulations! You have successfully complete this lesson. End of Procedure.

Edit Phone Number

Section 2 - Lesson 1 Exercises - Scenario 3: Edit Phone Number

Procedure

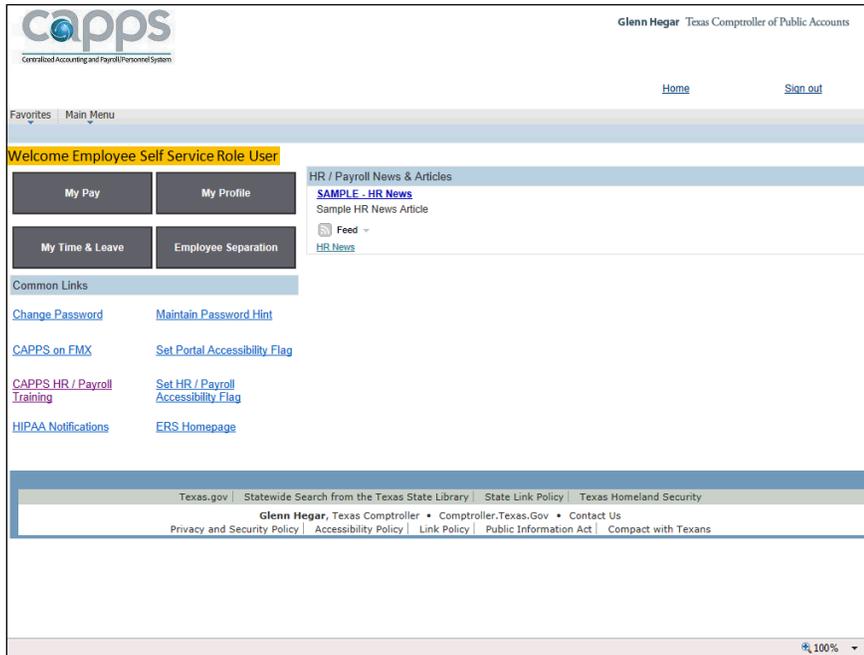
The **Edit Phone Numbers** page enables users to modify their personal phone number information. As a user, you now have the ability to ensure that your information is always up-to-date. In this lesson, the user will learn how to complete the following tasks:

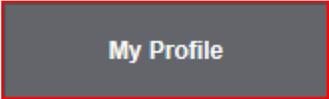
1. Designate preferred contact number
2. Delete an old phone number
3. Add a new phone number
4. Add a fax number

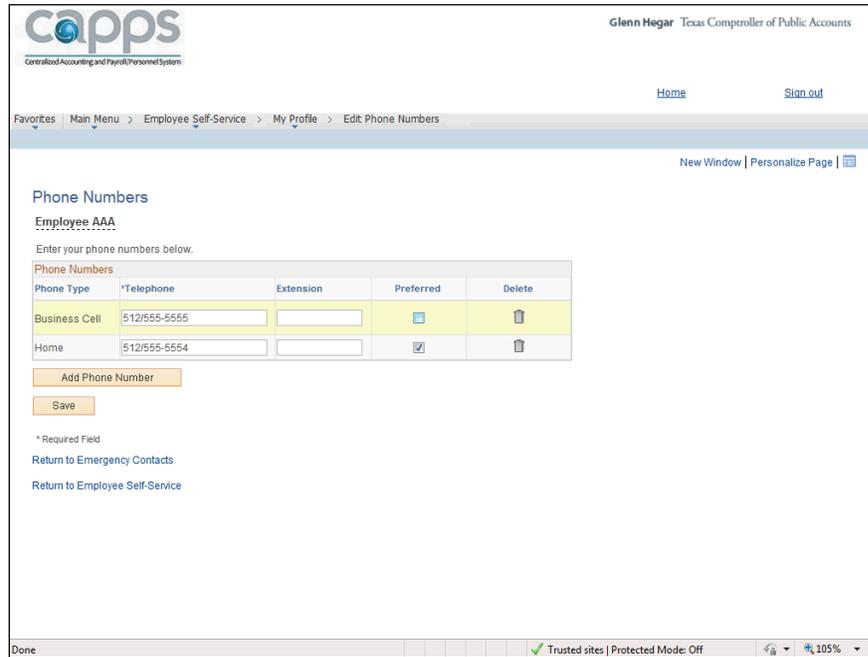
Note: for security purposes real names, addresses, and phone numbers have not been used.

CAPPS HR/PAYROLL

EUT Course

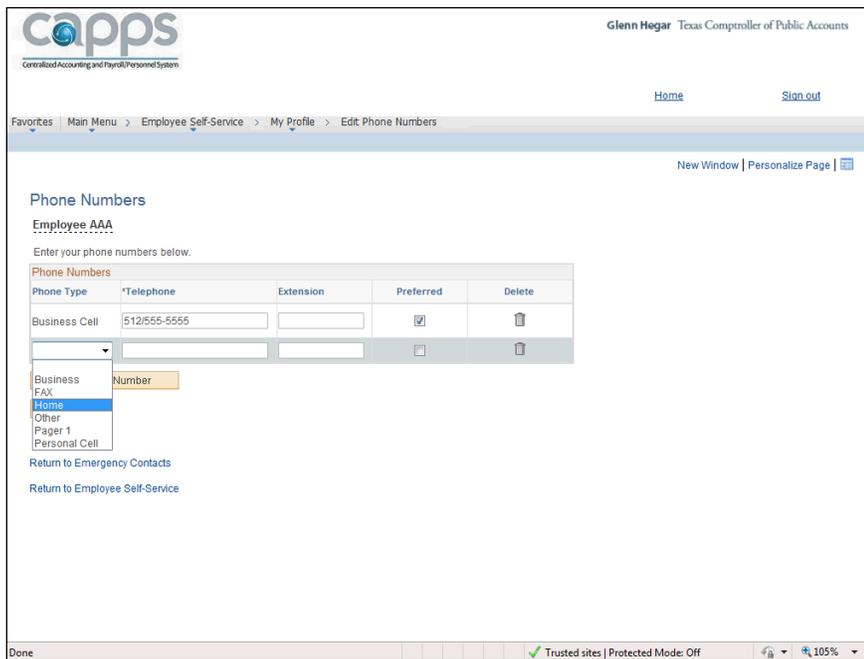


Step	Action
1.	Click the My Profile button. 
2.	Click the Edit Phone Numbers link. 

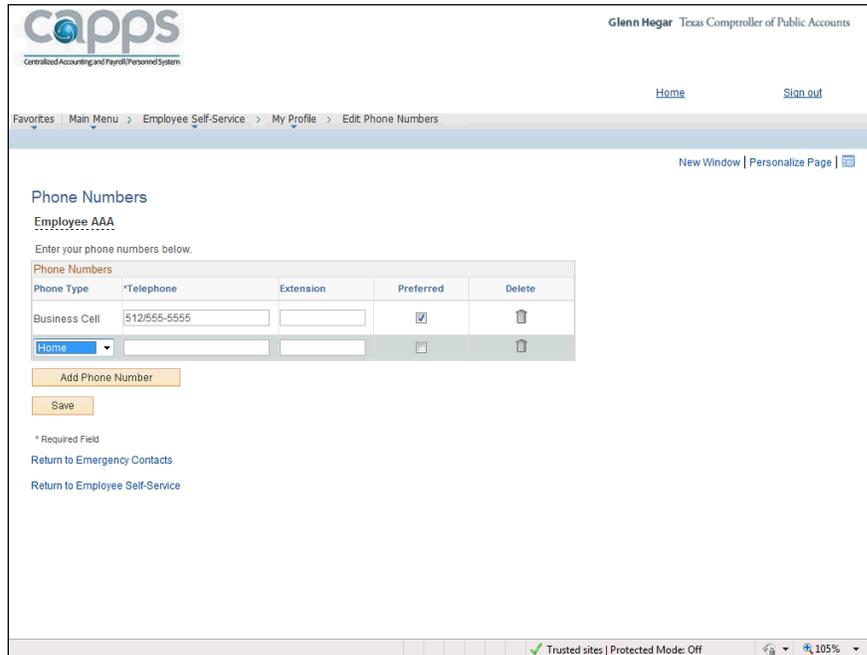


Step	Action
3.	<p>We will designate a Preferred Contact Number. _</p> <p>CAPPS only allows one contact number as the designated preferred number, or the number where you prefer to be reached.</p> <p>It is designated by a check box under the Preferred option.</p> <p>In this example, you will change the preferred designation from the Home phone number to the Business Cell phone number.</p> <p>Click the Preferred option for Business Cell.</p> 
4.	<p>The Business Cell number is now the designated phone number to be used.</p>
5.	<p>Now, we will delete an Old Phone Number.</p> <p>Notice how there is no 'Edit Pencil' icon here. For this reason, you will need to delete the old phone number and add the new phone number to make the change.</p> <p>Click the Delete button to remove the old phone number.</p> 

Step	Action
6.	The system will prompt you for deleting the number to make sure that is the task that you want to perform. Click the Yes - Delete button. 
7.	To add the new phone number, click the Add Phone Number button. 
8.	Click the Phone Type list. 



Step	Action
9.	Click the Home list item. 

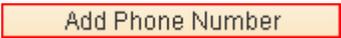


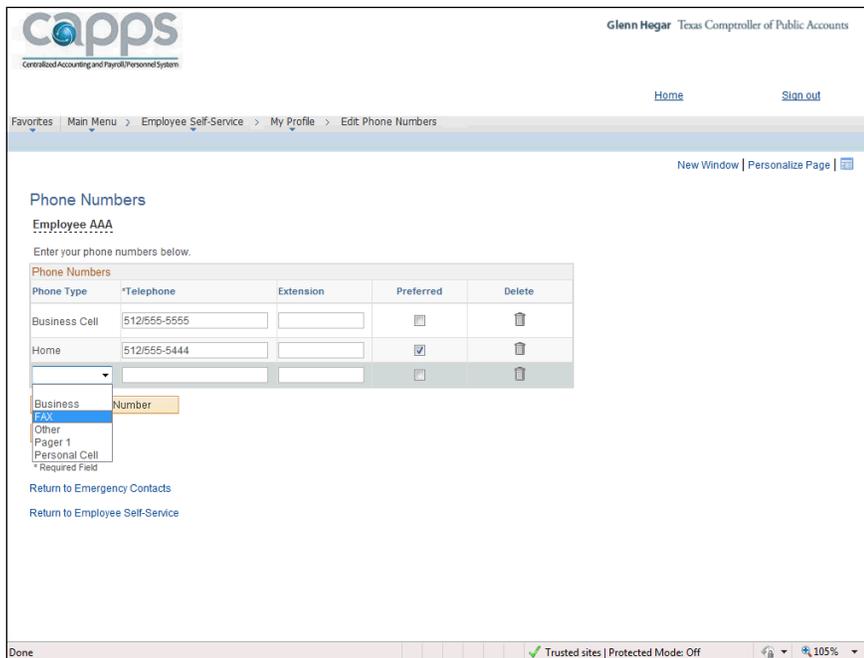
Step	Action
10.	Click in the Telephone field. 
11.	Enter the new phone number into the Telephone field. Enter " 512/555-5444 ".
12.	To change your preferred phone number back to your home phone, click the Preferred option box. 
13.	Remember to click the Save button before navigating to a different page. If you do NOT click the Save button the information will be lost. Click the Save button. 
14.	The system will confirm the information was saved successfully. Click the OK button. 

CAPPS HR/PAYROLL

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Step	Action
15.	<p>Now, we will add a fax number.</p> <p>Click the Add Phone Number button.</p> 
16.	<p>Click the Phone Type list.</p> 



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Home Sign out

Favorites Main Menu > Employee Self-Service > My Profile > Edit Phone Numbers

New Window | Personalize Page

Phone Numbers

Employee AAA

Enter your phone numbers below.

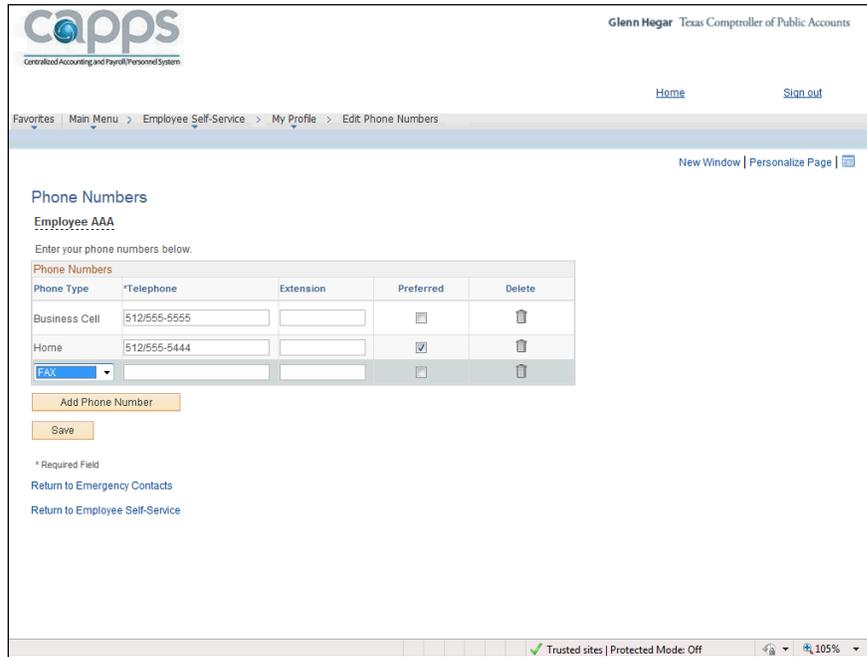
Phone Type	*Telephone	Extension	Preferred	Delete
Business Cell	512/555-5555		<input type="checkbox"/>	
Home	512/555-5444		<input checked="" type="checkbox"/>	
Business	Number		<input type="checkbox"/>	

FAX
 Other
 Pager 1
 Personal Cell
 * Required Field

[Return to Emergency Contacts](#)
[Return to Employee Self-Service](#)

Done Trusted sites | Protected Mode: Off 105%

Step	Action
17.	<p>Click the FAX list item.</p> 



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Home Sign out

Favorites Main Menu Employee Self-Service My Profile Edit Phone Numbers

New Window Personalize Page

Phone Numbers

Employee AAA

Enter your phone numbers below.

Phone Type	*Telephone	Extension	Preferred	Delete
Business Cell	512/555-5555		<input type="checkbox"/>	
Home	512/555-5444		<input checked="" type="checkbox"/>	
FAX			<input type="checkbox"/>	

Add Phone Number

Save

* Required Field

[Return to Emergency Contacts](#)

[Return to Employee Self-Service](#)

Trusted sites | Protected Mode: Off

Step	Action
18.	Click in the Telephone field. 
19.	Enter the fax number into the Telephone field. Enter " 512/555-4455 ".
20.	Remember to click the Save button before navigating to a different page. If you do NOT click the Save button the information will be lost. Click the Save button. 
21.	The system will confirm the information was saved successfully. Click the OK button. 
22.	Congratulations! You have successfully completed this lesson. End of Procedure.

Edit Mailing Addresses

Section 2 - Lesson 1 Exercises - Scenario 4: Edit Mailing Addresses

Procedure

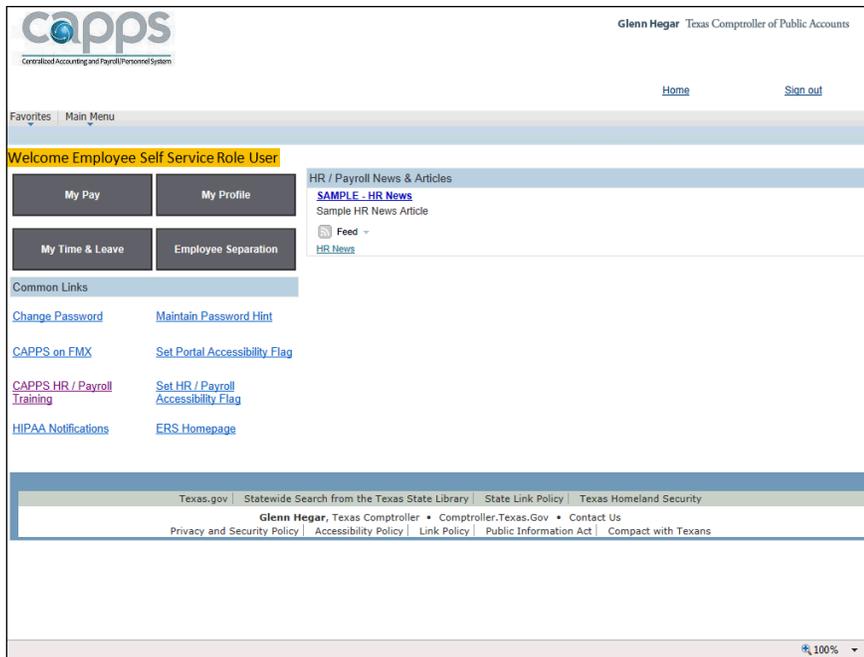
CAPPS HR/PAYROLL

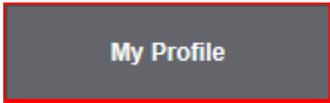
EUT Course

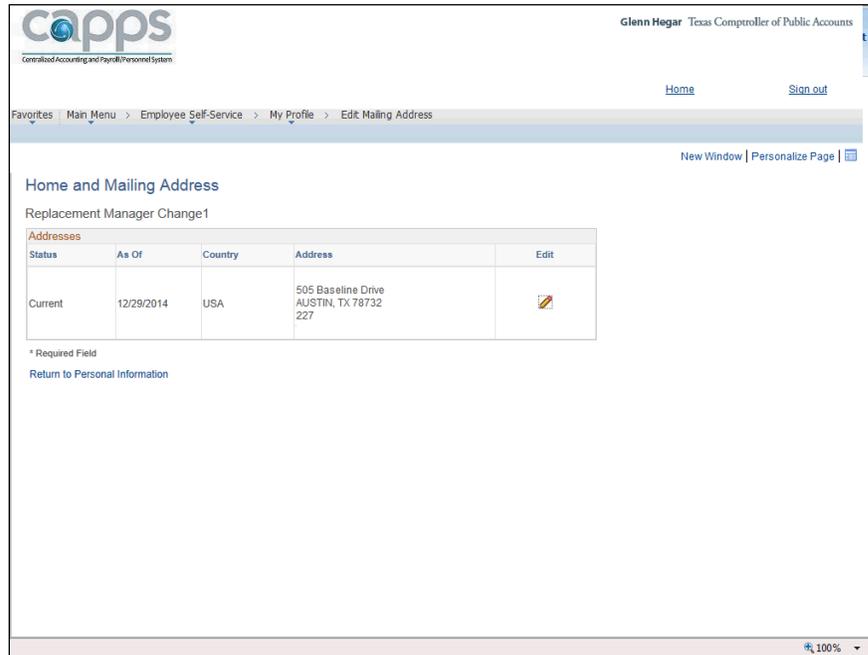


Addresses are effective dated meaning you can change an address as of a specific date. In this lesson, the user will learn how to change a mailing address and make it effective as of April 1, 2015.

Note: for security purposes real names, addresses, and phone numbers have not been used.



Step	Action
1.	Click the My Profile button. 
2.	Click the Edit Mailing Address link. 



Step	Action
3.	Click the Edit pencil icon. 
4.	The ' Change As Of ' date is the date you want the new address to take effect. In this example the new address will take effect on April 1, 2015. Click the Choose a date button. 
5.	Click the dropdown arrow to select the month April . 
6.	Click April from the list. 
7.	Click the number ' 1 ' for the date. Note: you can pick any day of the year. 
8.	Click in the Address 1 field. 
9.	Press [Delete] .

Step	Action
10.	Enter the new address information into the Address 1 field. Enter " 6001 Baseline Drive SW ". Address 1
11.	Note: Since the City and State did not change, you can skip over the fields. Click in the Postal field. Postal 78732
12.	Press [Backspace].
13.	Enter the new Zip Code into the Postal field. Enter " 78731 ". Postal 7873
14.	Remember to click the Save button before navigating to a different page. If you do NOT click the Save button the information will be lost. Click the Save button. 
15.	The system will confirm the information was saved successfully. Click the OK button. 
16.	Notice how the new address has the status of "Future". This is because it is a future dated row. On April 1, 2015 the status will change to "Current".
17.	Congratulations! You have successfully completed this lesson. End of Procedure.

Request Name Change

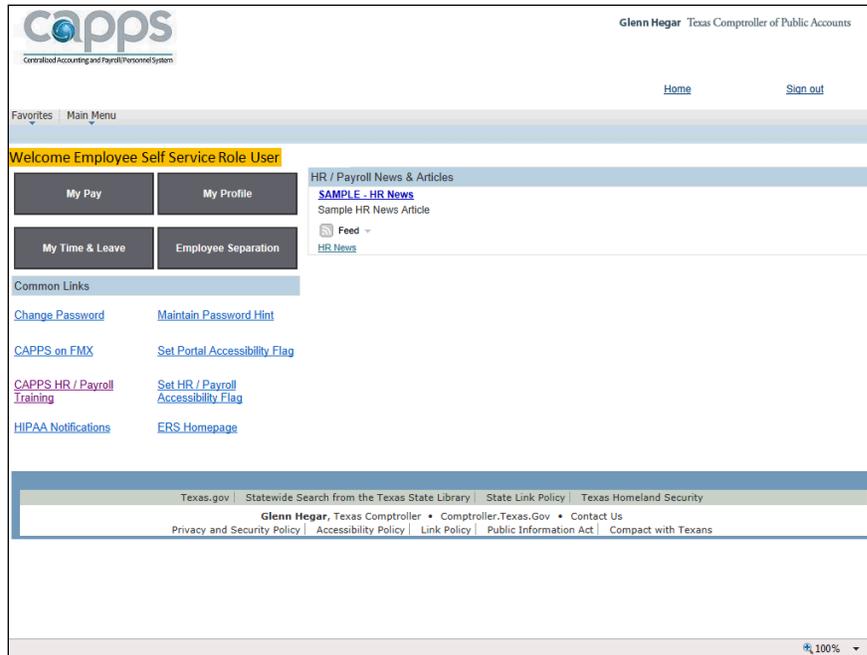
Section 2 - Lesson 1 Exercises - Scenario 5: Request Name Change

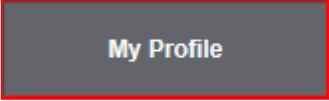
Note: This functionality is not available to users in agencies which selected Manager Self Service (MSS) Lite.

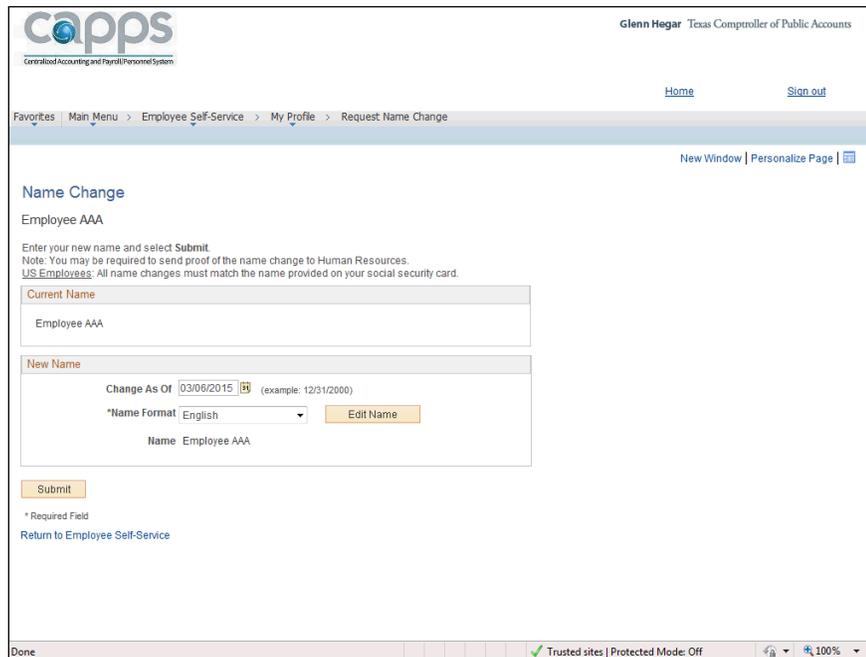
Procedure

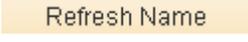
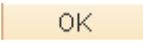
In this lesson you will learn how to change your name in CAPPS. This is generally due to a marriage, divorce, adoption, or another type of a legal name change.

Note: for security purposes real names, addresses, and phone numbers have not been used.



Step	Action
1.	Click the My Profile button. 
2.	Click the Request Name Change link. 
3.	NOTE: The ' Change As Of ' date is the date the name change will take effect in the system. This date may be changed if needed.



Step	Action
4.	Click the Edit Name button. 
5.	Click in the Last Name field. 
6.	Enter the new Last Name . In this example, enter " BBB ".
7.	Click the Refresh Name button to update the information. 
8.	Notice how the update information is now reflected on the page.
9.	Click the OK button to accept the change. 
10.	Please be sure to provide the required information to your Human Resources representative.

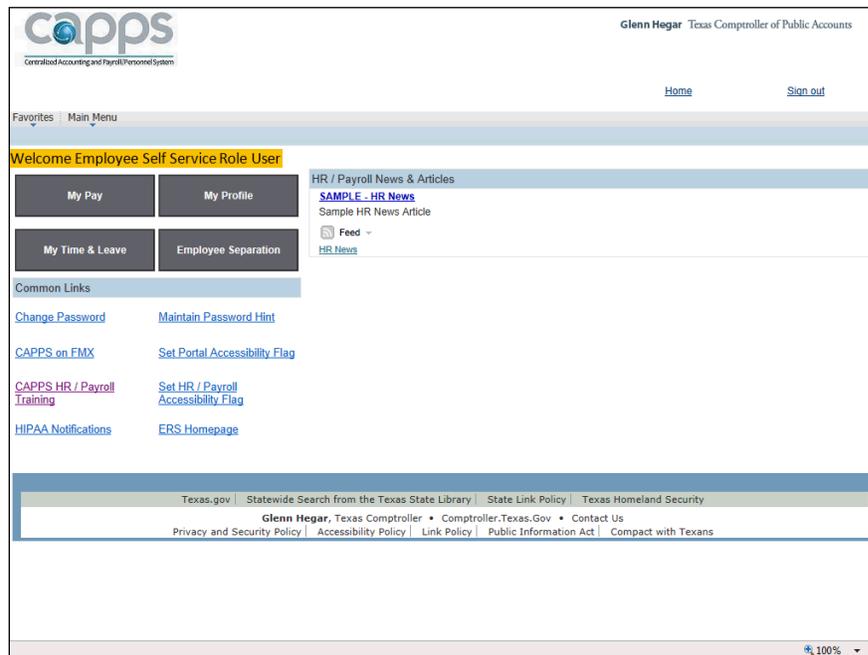
Step	Action
11.	Click the Submit button. After clicking the Submit button, this information is then forwarded to your manager for approval. 
12.	Click the OK button to continue. 
13.	Congratulations! You have successfully completed this lesson. End of Procedure.

Information Release Indicator

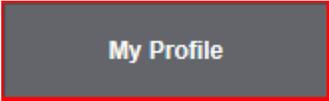
Section 2 - Lesson 1 Exercises - Scenario 6: Information Release Indicator

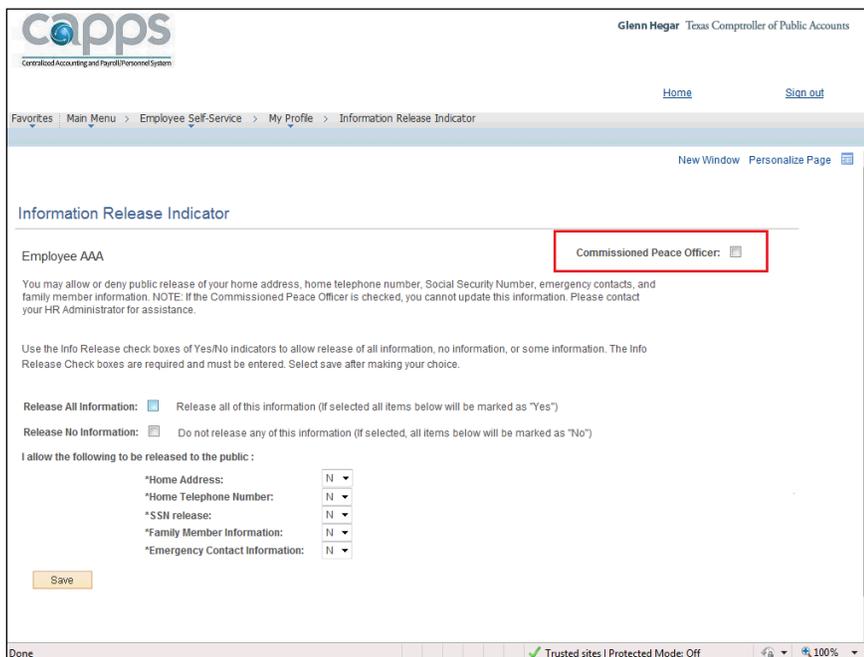
Procedure

In this section, you will learn how to designate if your personal information is released or not released to the public.



The screenshot displays the CAPPS Employee Self Service Role User interface. At the top, the CAPPS logo and 'Glenn Hegar, Texas Comptroller of Public Accounts' are visible. The main content area includes a 'Welcome Employee Self Service Role User' message, a navigation menu with buttons for 'My Pay', 'My Profile', 'My Time & Leave', and 'Employee Separation', and a 'Common Links' section with various utility links. The footer contains the state's name and several policy-related links.

Step	Action
1.	Click the My Profile button. 
2.	Click the Information Release Indicator link. Information Release Indicato
3.	NOTE: It is important that you read and understand the statements on this page before selecting an indicator. If you need assistance before completing this page, contact your Human Resources Representative.
4.	It is important to note that if you are a Commissioned Peace Officer you must select the applicable box. When this box is selected all values are automatically defaulted to 'N' for no release of information.



Glenn Hegar Texas Comptroller of Public Accounts

Home Sign out

Favorites | Main Menu > Employee Self-Service > My Profile > Information Release Indicator

New Window Personalize Page

Information Release Indicator

Employee AAA Commissioned Peace Officer:

You may allow or deny public release of your home address, home telephone number, Social Security Number, emergency contacts, and family member information. NOTE: If the Commissioned Peace Officer is checked, you cannot update this information. Please contact your HR Administrator for assistance.

Use the Info Release check boxes of Yes/No indicators to allow release of all information, no information, or some information. The Info Release Check boxes are required and must be entered. Select save after making your choice.

Release All Information: Release all of this information (if selected all items below will be marked as "Yes")

Release No Information: Do not release any of this information (if selected, all items below will be marked as "No")

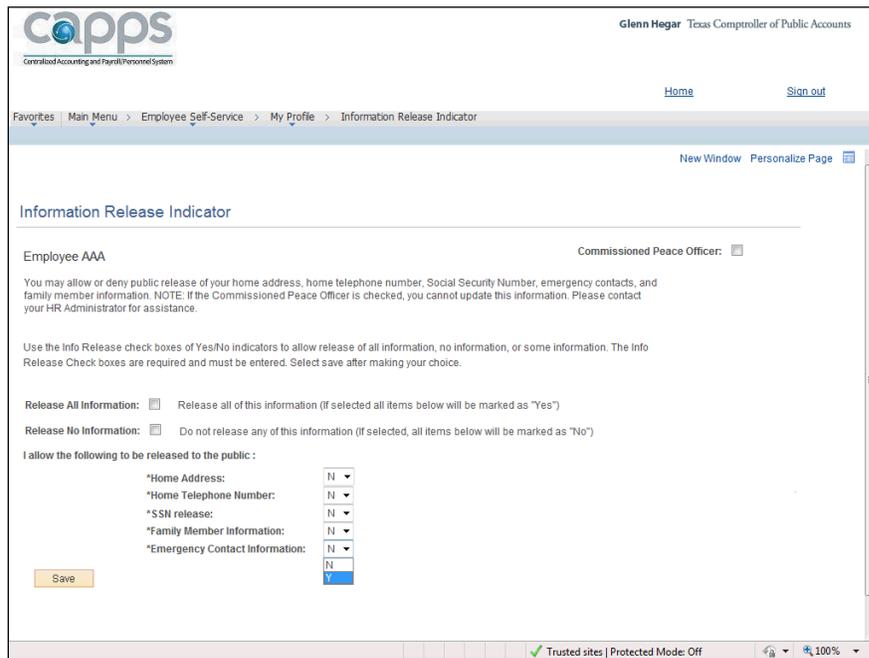
I allow the following to be released to the public :

*Home Address:	N
*Home Telephone Number:	N
*SSN release:	N
*Family Member Information:	N
*Emergency Contact Information:	N

Save

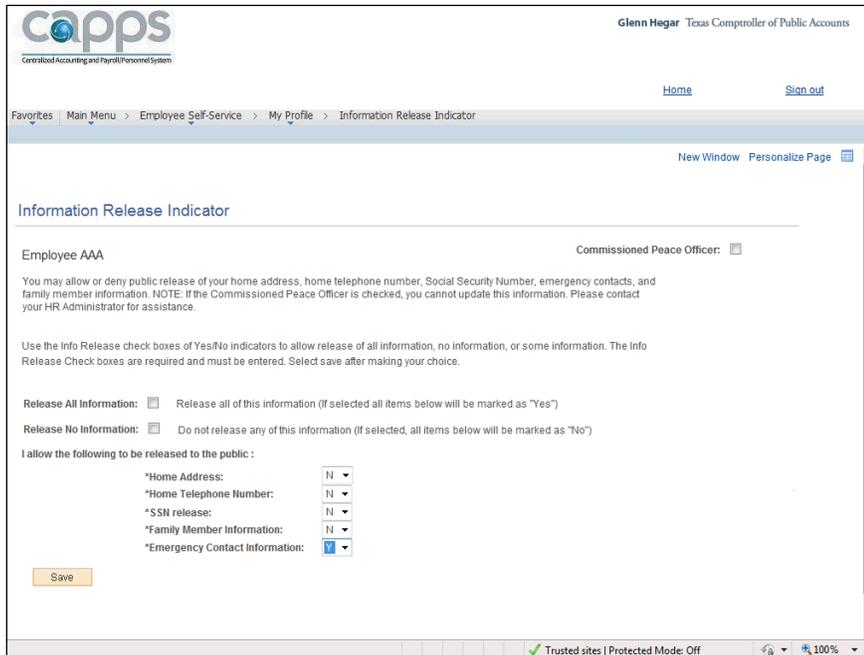
Done Trusted sites | Protected Mode: Off 100%

Step	Action
5.	<p>Click the 'Release All Information' box to authorize release of all the information listed below.</p> <p>Note: It is not recommended by CAPPS that you release personal confidential information, (e.g.Social Security Number).</p> <p>Click the Release All Information option.</p> <p>Release All Information: </p>
6.	<p>Click the Release No Information check box.</p> <p>Notice how all the values below changed to an 'N' for No Release.</p> <p>Release No Information: </p>
7.	<p>If you do not select either box above, you can select each box individually to indicate whether or not you would like the information released.</p> <p>In this example, click the Emergency Contact Information dropdown arrow to change the value to a 'Y' indicating a Yes to release the information.</p> <p>*Emergency Contact Information: </p>



The screenshot shows the 'Information Release Indicator' page for Employee AAA. The page includes a header with the CAPPS logo and 'Glenn Hegar Texas Comptroller of Public Accounts'. The breadcrumb trail is 'Home > Sign out > Favorites > Main Menu > Employee Self-Service > My Profile > Information Release Indicator'. The page title is 'Information Release Indicator'. Below the title, it says 'Employee AAA' and 'Commissioned Peace Officer: '. A note states: 'You may allow or deny public release of your home address, home telephone number, Social Security Number, emergency contacts, and family member information. NOTE: If the Commissioned Peace Officer is checked, you cannot update this information. Please contact your HR Administrator for assistance.' Below this, instructions state: 'Use the Info Release check boxes of Yes/No indicators to allow release of all information, no information, or some information. The Info Release Check boxes are required and must be entered. Select save after making your choice.' There are two main options: 'Release All Information: Release all of this information (if selected all items below will be marked as "Yes")' and 'Release No Information: Do not release any of this information (if selected, all items below will be marked as "No")'. Under the heading 'I allow the following to be released to the public:', there are five dropdown menus: '*Home Address: N', '*Home Telephone Number: N', '*SSN release: N', '*Family Member Information: N', and '*Emergency Contact Information: N'. The 'Emergency Contact Information' dropdown is highlighted with a blue bar. A 'Save' button is located at the bottom left. The browser status bar at the bottom shows 'Trusted sites | Protected Mode: Off' and '100%' zoom.

Step	Action
8.	Click the 'Y' list item. 



Step	Action
9.	Remember to click the Save button before navigating to a different page. If you do NOT click the Save button the information will be lost. Click the Save button. 
10.	The system will confirm the information was saved successfully. Click the OK button. 
11.	Congratulations! You have successfully completed this lesson. End of Procedure.

Maintain Disability Status

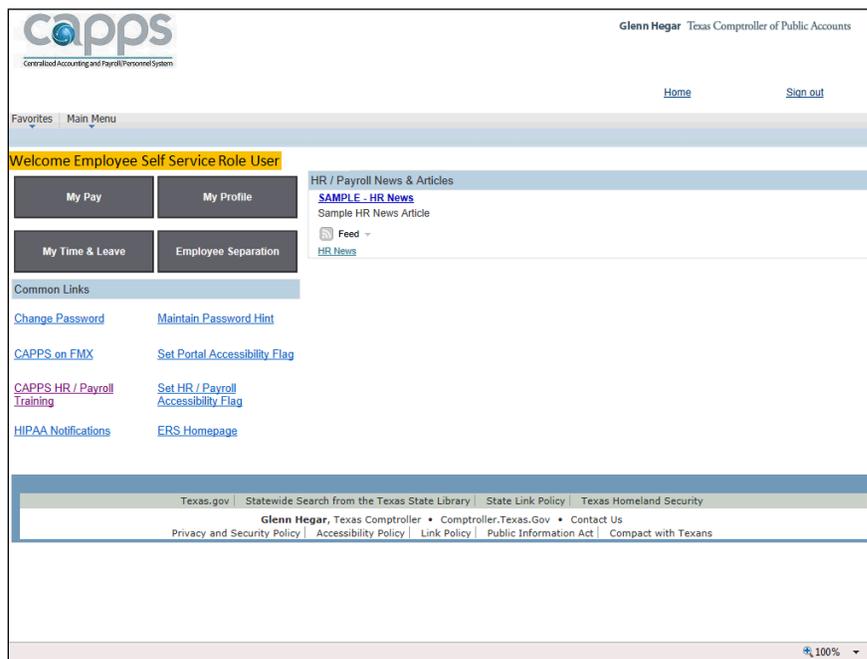
Section 2 - Lesson 1 Exercises - Scenario 7: Maintain Disability Status

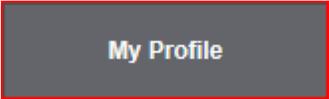
Procedure

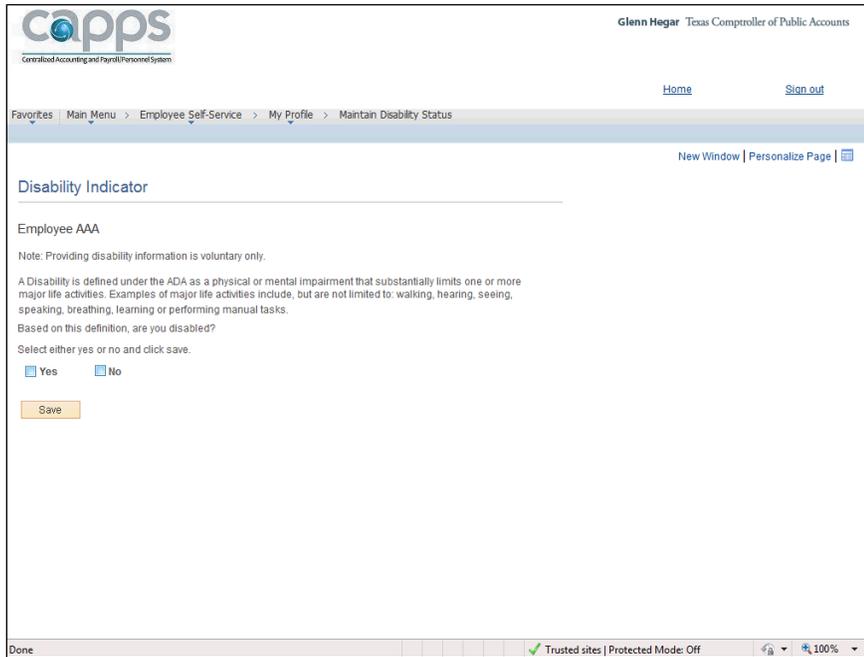
There may be an occasion when an employee may want to provide disability information to their employer.

In this lesson you will learn how to indicate whether or not a disability exists. Information specific to the type of disability will not be requested.

Completing this page is completely voluntary. Employees are not required to disclose any information as to whether or not a disability exists.



Step	Action
1.	Click the My Profile button. 
2.	Click the Maintain Disability Status link. 
3.	When filling out this page, be sure to first read the ADA disability definition.



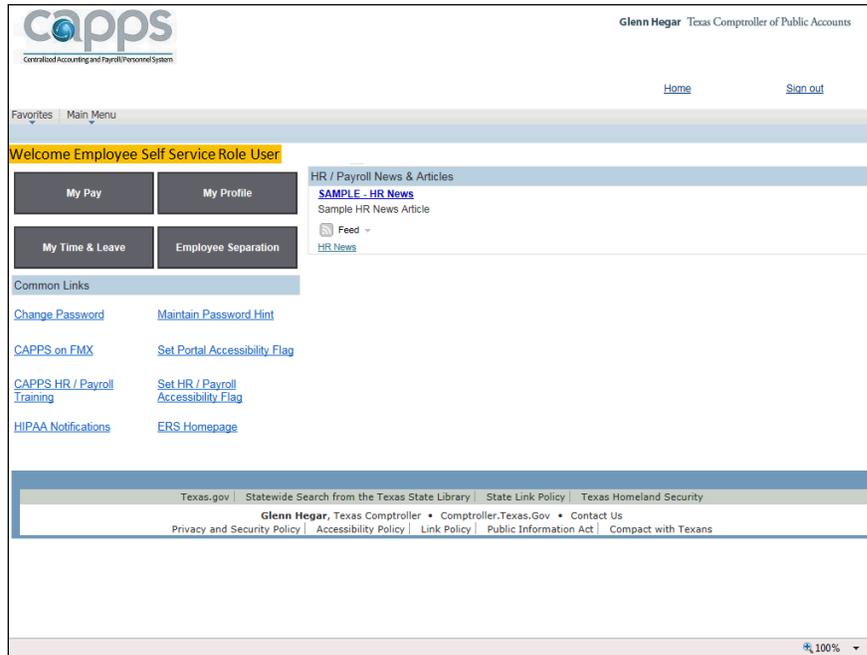
Step	Action
4.	In this example, click the ' No ' check box. 
5.	Remember to click the Save button before navigating to a different page. If you do NOT click the Save button the information will be lost. Click the Save button. 
6.	Congratulations! You have successfully completed this lesson. End of Procedure.

BRP Leveling / Non-Leveling

Section 2 - Lesson 1 Exercises - Scenario 8: BRP Leveling / Non-Leveling

Procedure

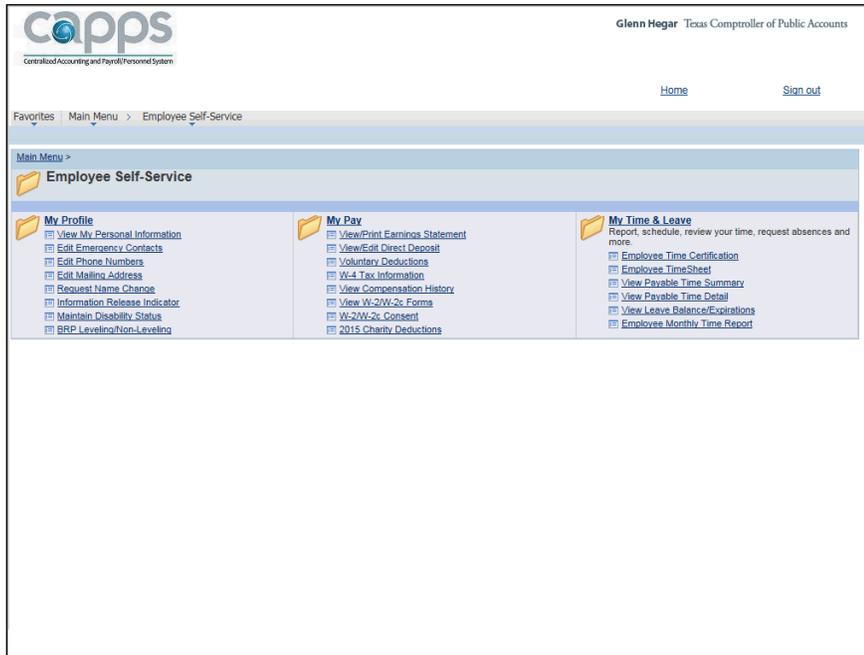
In this lesson you will learn how to designate your Benefits Replacement Pay (BRP) option.



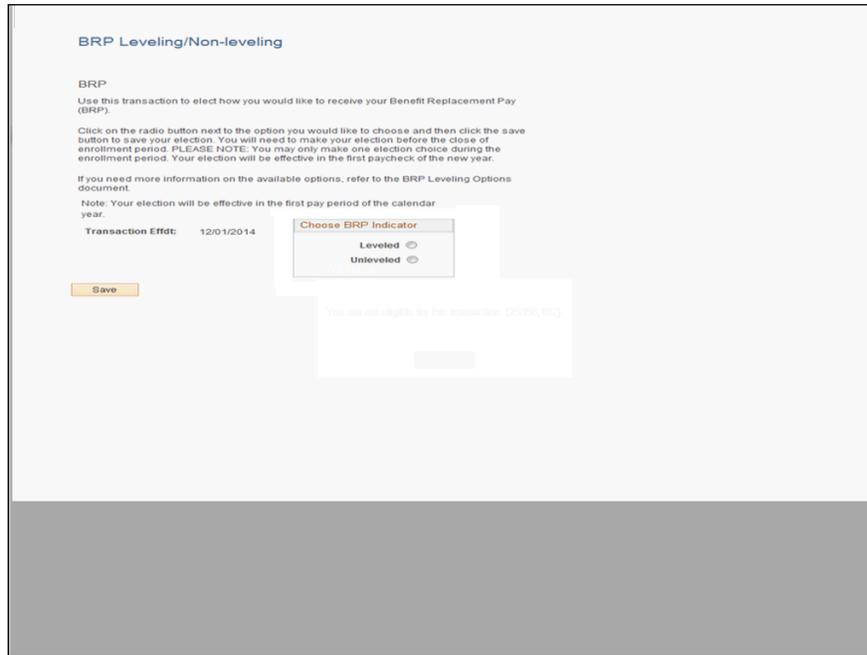
Step	Action
1.	Click the My Profile button. <div data-bbox="440 1100 769 1199" style="border: 2px solid red; padding: 5px; text-align: center; margin: 10px 0;"> My Profile </div>

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Step	Action
2.	Click the BRP Leveling/Non-Leveling link. BRP Leveling/Non-Leveling
3.	On this page you will select how you would like to receive your Benefit Replacement Pay (BRP). Leveled - allows you to receive the same BRP payment amount each month of the year. Unleveled - BRP payment amounts will vary each month of the year.



BRP Leveling/Non-leveling

BRP
Use this transaction to elect how you would like to receive your Benefit Replacement Pay (BRP).

Click on the radio button next to the option you would like to choose and then click the save button to save your election. You will need to make your election before the close of enrollment period. PLEASE NOTE: You may only make one election choice during the enrollment period. Your election will be effective in the first paycheck of the new year.

If you need more information on the available options, refer to the BRP Leveling Options document.

Note: Your election will be effective in the first pay period of the calendar year.

Transaction Effdt: 12/01/2014

Choose BRP Indicator

Leveled

Unleveled

Save

You are not eligible for this transaction. (0090,100)

Step	Action
4.	Remember to click the Save button before navigating to a different page. If you do NOT click the Save button the information will be lost. Click the Save button to continue. 
5.	The system will confirm the information was saved successfully.
6.	Congratulations! You have successfully completed this lesson. End of Procedure.

Section 3 - ePay

Section 3 - ePay

Section 3 - ePay has 4 lessons:

- Lesson 1 - Earnings
- Lesson 2 - Direct Deposit
- Lesson 3 - Deductions
- Lesson 4 - Tax

Lesson 1 - Earnings

Section 3, Lesson 1

View and Print Earnings Statement

View/Print Earnings Statement

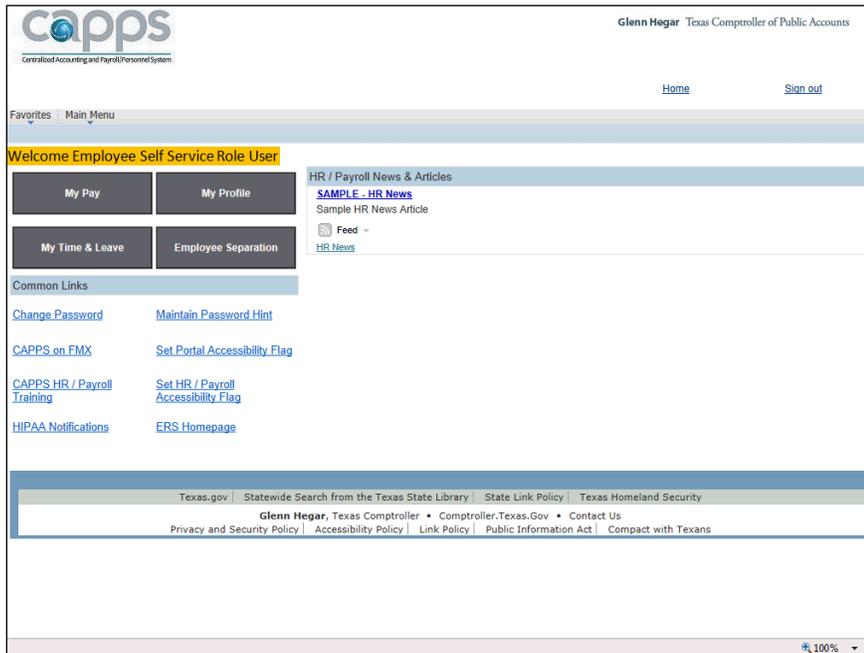
Section 3 - Lesson 1 Exercises - Scenario 1: View/Print Earnings Statement

Procedure

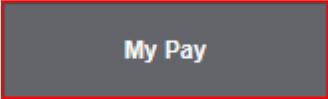
Your **Earnings Statement** is your paycheck. In this lesson you will learn how to complete the following:

1. View your earnings statement
2. Print your earnings statement

Note: For security purposes information within this lesson has been changed.



The screenshot shows the CAPPS Employee Self Service portal. At the top left is the CAPPS logo and the text "Centralized Accounting and Payroll/Personnel System". At the top right is the name "Glenn Hegar" and the title "Texas Comptroller of Public Accounts". Below the logo is a navigation bar with "Home" and "Sign out" links. A "Favorites" and "Main Menu" section is visible. A yellow banner reads "Welcome Employee Self Service Role User". Below this are several menu items: "My Pay", "My Profile", "My Time & Leave", and "Employee Separation". To the right of these items is a section for "HR / Payroll News & Articles" containing a "SAMPLE - HR News" article and an "HR News" feed. A "Common Links" section includes links for "Change Password", "Maintain Password Hint", "CAPPS on FMX", "Set Portal Accessibility Flag", "CAPPS HR / Payroll Training", "Set HR / Payroll Accessibility Flag", "HIPAA Notifications", and "ERS Homepage". At the bottom, there is a footer with various links including "Texas.gov", "Statewide Search from the Texas State Library", "State Link Policy", "Texas Homeland Security", "Glenn Hegar, Texas Comptroller", "Comptroller.Texas.Gov", "Contact Us", "Privacy and Security Policy", "Accessibility Policy", "Link Policy", "Public Information Act", and "Compact with Texans". A zoom level of 100% is shown in the bottom right corner.

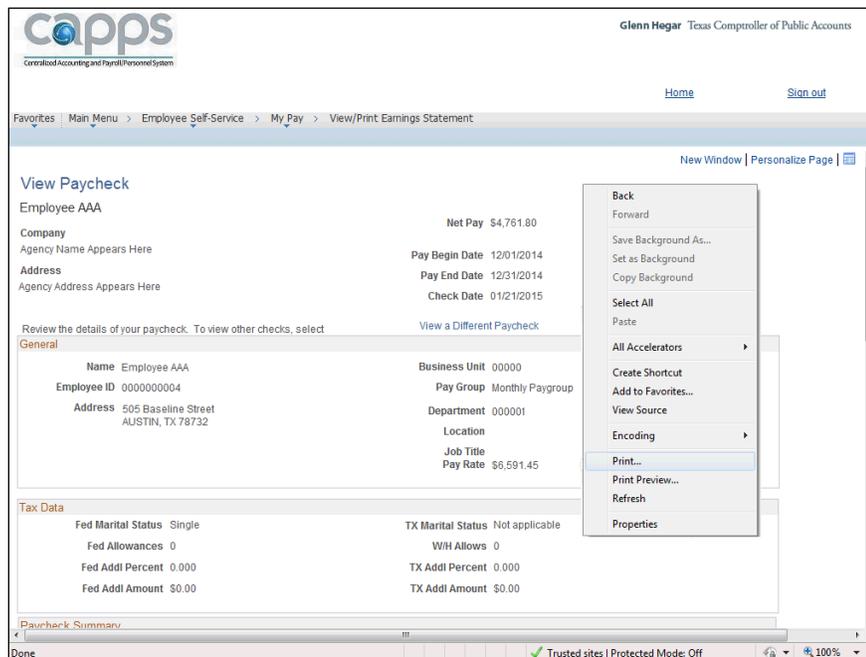
Step	Action
1.	<p>First, we will view your earnings statement.</p> <p>Click the My Pay button.</p> 
2.	<p>Click the View/Print Earnings Statement link.</p> <p>View/Print Earnings Statement</p>
3.	<p>Note: Only Earning Statements generated in CAPPS will appear on this page. As time progresses, additional Earning Statements will be available. Use the 'View All' link to display additional Earning Statements.</p>
4.	<p>In this instance there is only one Earnings Statement available to view.</p> <p>The system is displaying one record, and there is only one record for this employee.</p>
5.	<p>Click the date of the Earnings Statement that you want to view.</p> <p>In this example, click the 01/21/2015 link.</p> <p>01/21/2015</p>
6.	<p>The Earnings Statement for the date you selected will automatically appear.</p> <p>The top portion of the Earnings Statement contains General and Tax Withholding information.</p> <p>Click the scroll bar to navigate down the page.</p>
7.	<p>The middle portion of the Earnings Statement contains your Paycheck Summary, Earnings, and Tax withholding information.</p> <p>Click the scroll bar to navigate down the page.</p>
8.	<p>The bottom portion of the Earnings Statement contains Before and After Tax Deduction, and Employer Paid Benefits.</p> <p>The Net Pay Distribution box contains banking information.</p> <p>Click the scroll bar to navigate to the top of the page.</p>

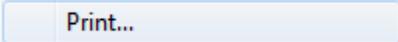
CAPPS HR/PAYROLL

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Step	Action
9.	<p>Now, we will print an earnings statement</p> <p>Begin by right-clicking in any open space with your mouse.</p> <p>Note: You can also use the print icon at the top of the page.</p>



Step	Action
10.	<p>Click the Print... option from the menu.</p> <p></p>
11.	<p>Select the applicable printer at the top of the pop-up window.</p> <p>Click the Print button.</p> <p></p>
12.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

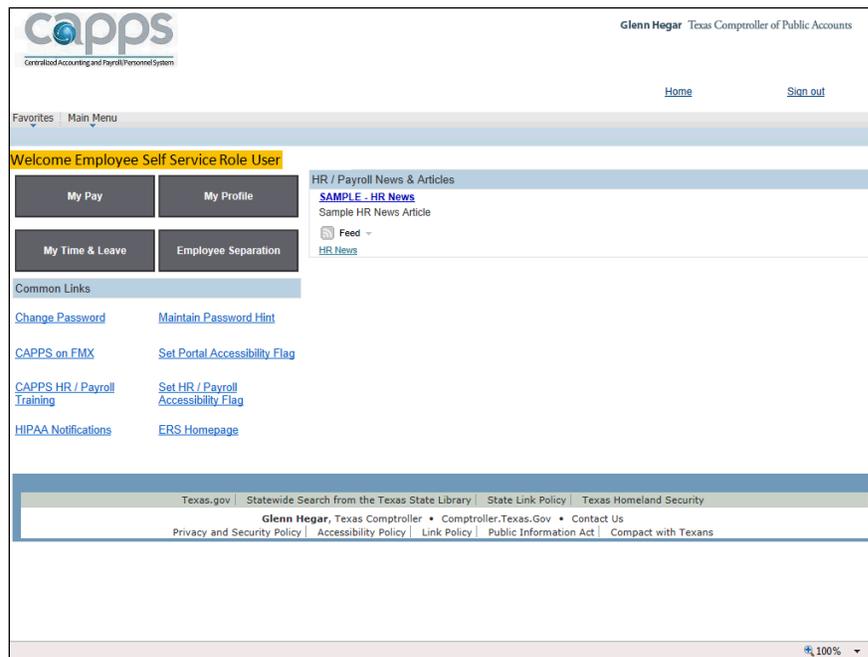
View Compensation History

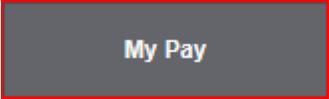
Section 3 - Lesson 1 Exercises - Scenario 2: View Compensation History

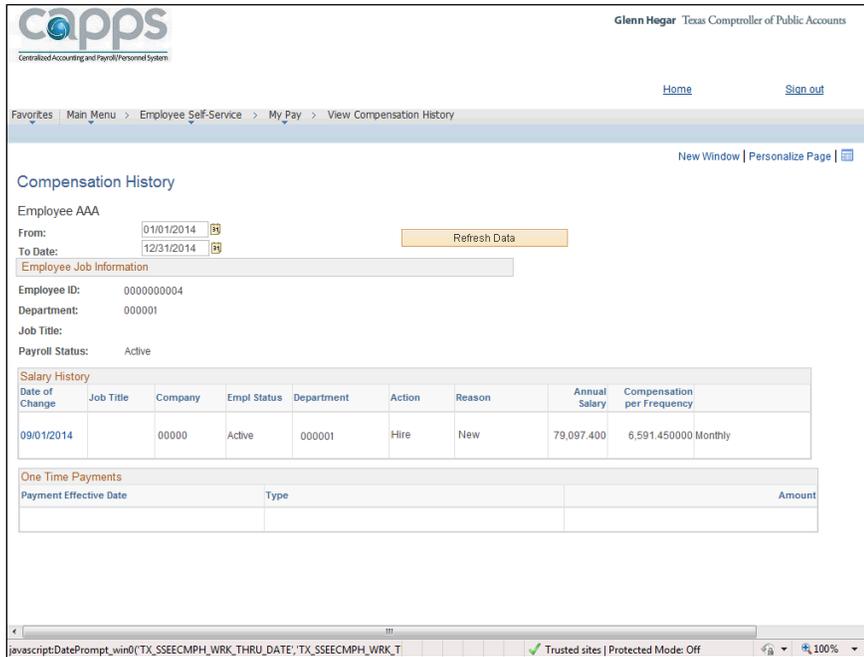
Procedure

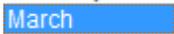
The Compensation History page allows you to view promotion, data, and pay rate changes.

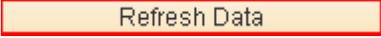
In this lesson you will learn how to view a promotion with an increase in pay.



Step	Action
1.	Click the My Pay button. 
2.	Click the View Compensation History link. View Compensation Histor
3.	Employee AAA was hired 9/1/2014. Notice how the ' From ' and ' To Date ' fields reflect the range of 01/01/2014 through 12/31/2014. In 2015, Employee AAA received a promotion. Next, you will change the ' From ' and ' To Date ' dates in order to view the promotion details.



Step	Action
4.	Click the Choose a date button. 
5.	Click the drop down arrow to change the month. 
6.	Click the month of March. 
7.	Click the drop down arrow to select the year. 
8.	Click the year 2015. 
9.	Click the last day of the month. Note: you can select any applicable date. 

Step	Action
10.	<p>Click the Refresh Data button.</p> <p>This will retrieve any new information for the dates you selected.</p> 
11.	<p>Notice how Employee AAA's promotion is now displayed. The promotion was dated 02/15/2015. In order for it to appear in the results window, the applicable date range needed to be entered,</p>
12.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Lesson 2 - Direct Deposit

Section 3, Lesson 2

Add or Change Direct Deposit Information

View/Edit Direct Deposit

Section 3 - Lesson 2 Exercises - Scenario 1: View/Edit Direct Deposit

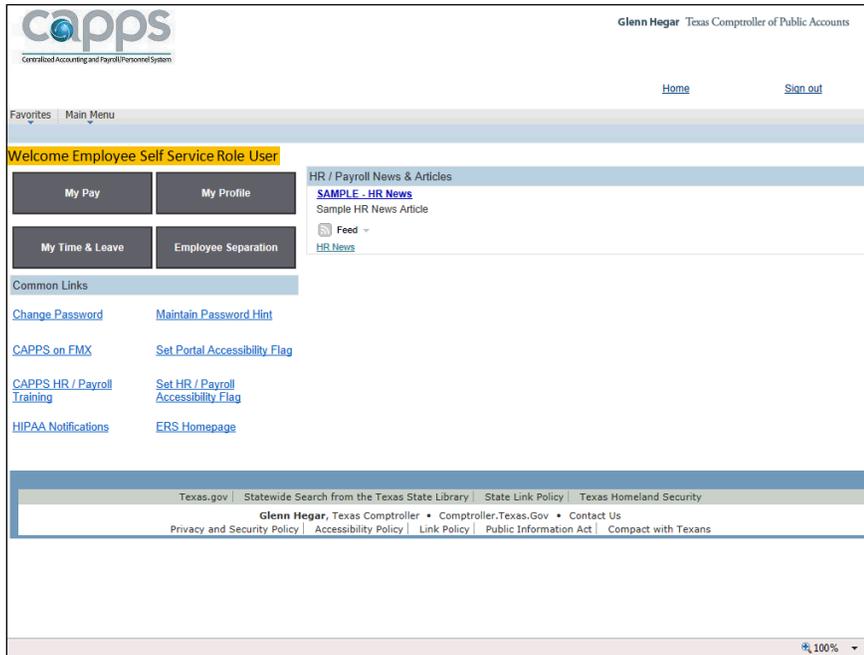
Procedure

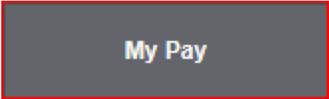
In this lesson you will learn the following:

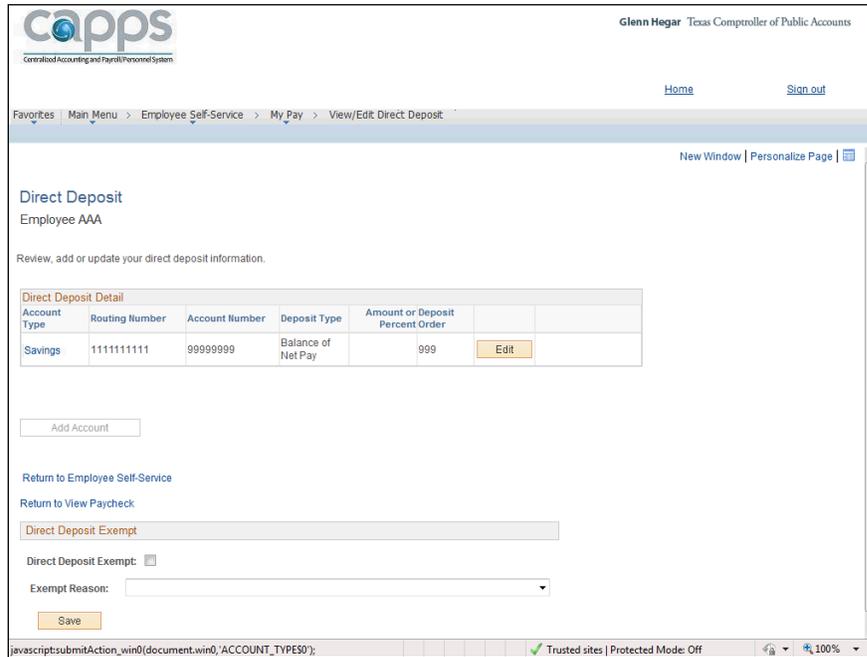
1. How to view your direct deposit information.
2. How to edit your direct deposit information.

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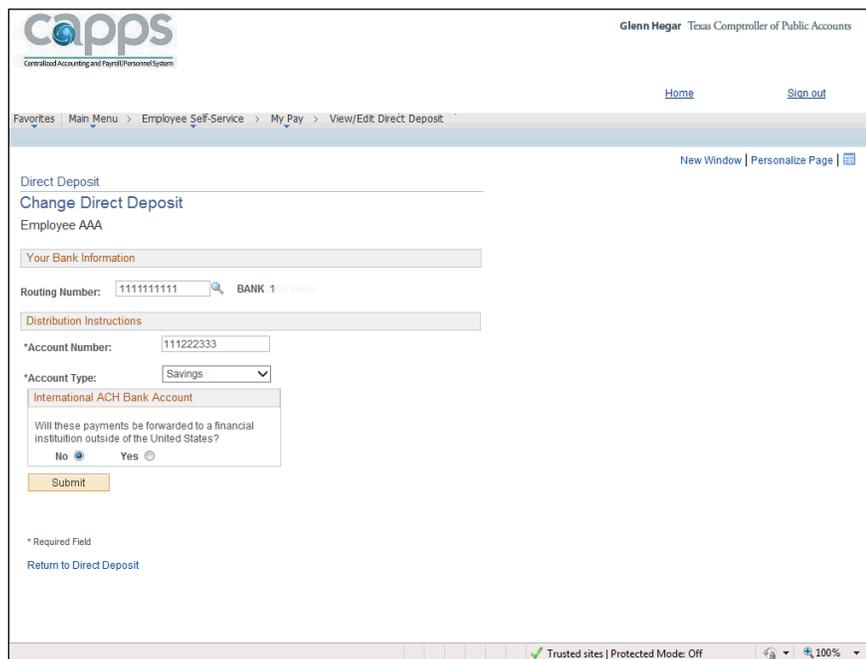


Step	Action
1.	Click the My Pay button. 
2.	Click the View/Edit Direct Deposit link. 
3.	The current Direct Deposit information is displayed. <u>It is important to note that in CAPPS there can only be one account set up for direct deposit.</u>



Step	Action
4.	To view Direct Deposit details, click the Savings link. Savings
5.	The Direct Deposit Detail page automatically displays. This page contains banking detail information. Click the Return to Direct Deposit link. Return to Direct Deposit
6.	Now, we will edit your direct deposit information. Employee AAA is changing his/her direct deposit from his/her savings account to his/her checking account. Both accounts are at the same bank. To begin click the Edit button. Edit

Step	Action
7.	<p>If you know the Routing Number you can type it directly in the box.</p> <p>If you do not know the Routing Number, you can use the Look Up Glass to locate your bank's Routing Number.</p> <p>Employee AAA is changing the type of account at the same bank, therefore the routing number will not change.</p>
8.	<p>Click in the Account Number field.</p> <p>99999999</p>
9.	<p>Enter the new Bank Account Number into the Account Number field.</p> <p>Employee AAA Bank checking account number is 111222333.</p> <p>Enter "111222333".</p>



Glenn Hegar Texas Comptroller of Public Accounts

Home Sign out

Favorites Main Menu Employee Self-Service My Pay View/Edit Direct Deposit

Direct Deposit

Change Direct Deposit

Employee AAA

Your Bank Information

Routing Number: 111111111 BANK 1

Distribution Instructions

*Account Number: 111222333

*Account Type: Savings

International ACH Bank Account

Will these payments be forwarded to a financial institution outside of the United States?

No Yes

Submit

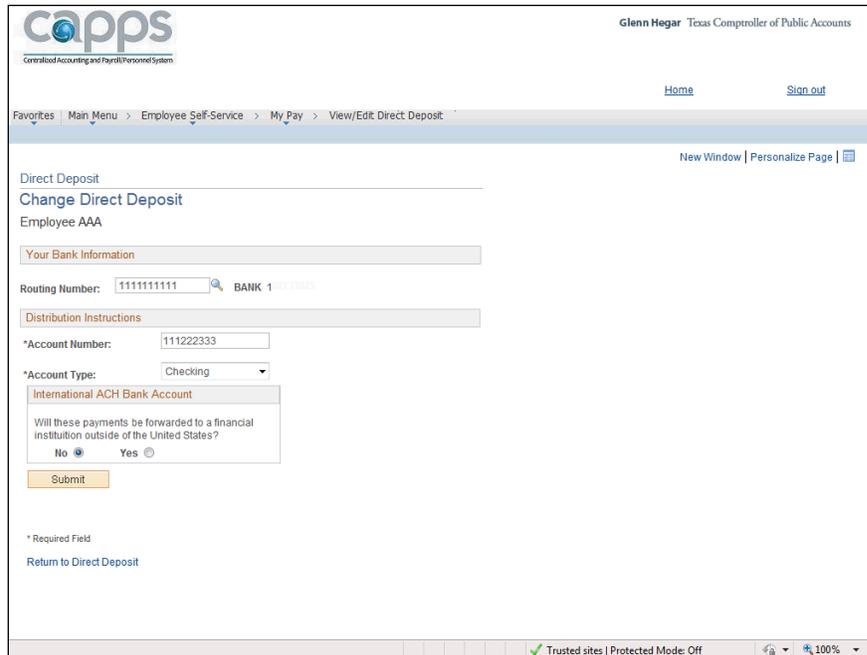
* Required Field

Return to Direct Deposit

Trusted sites | Protected Mode: Off

Step	Action
10.	<p>Click on the drop down arrow to select 'Checking'.</p> <p>▼</p>

Step	Action
11.	Click the Account Type option ' Checking '.



The screenshot shows the 'Change Direct Deposit' page for Employee AAA. The 'Your Bank Information' section has a routing number of 1111111111. The 'Distribution Instructions' section has an account number of 111222333 and the account type is set to 'Checking'. There is a 'Submit' button at the bottom of the form.

Step	Action
12.	To accept the change, click the Submit button.
13.	Congratulations! You have successfully completed this lesson. End of Procedure.

Lesson 3 - Deductions

Section 3, Lesson 3

View, Add, or Update Voluntary or Charitable Deductions

Voluntary Deductions

Section 3 - Lesson 3 Exercises - Scenario 1: Voluntary Deductions

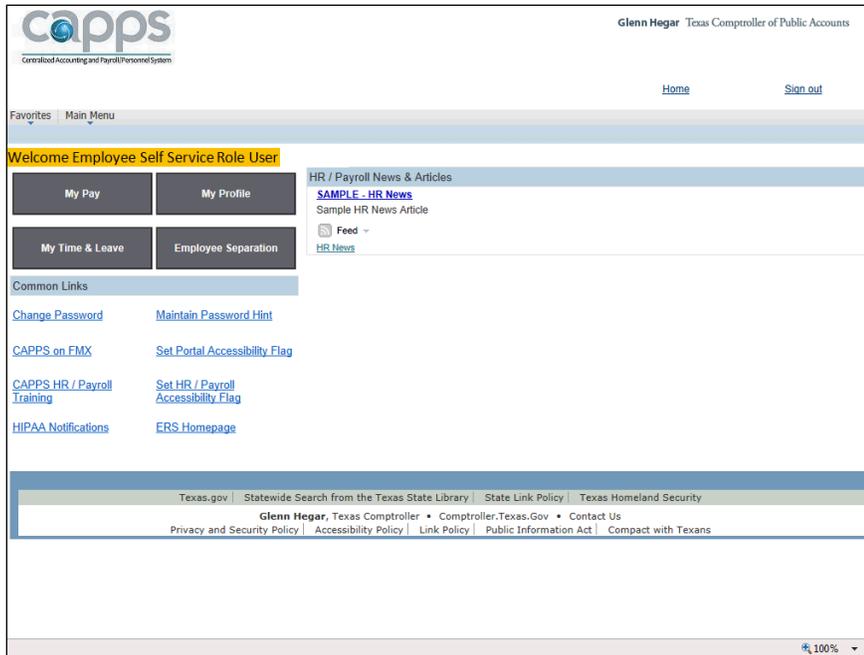
Procedure

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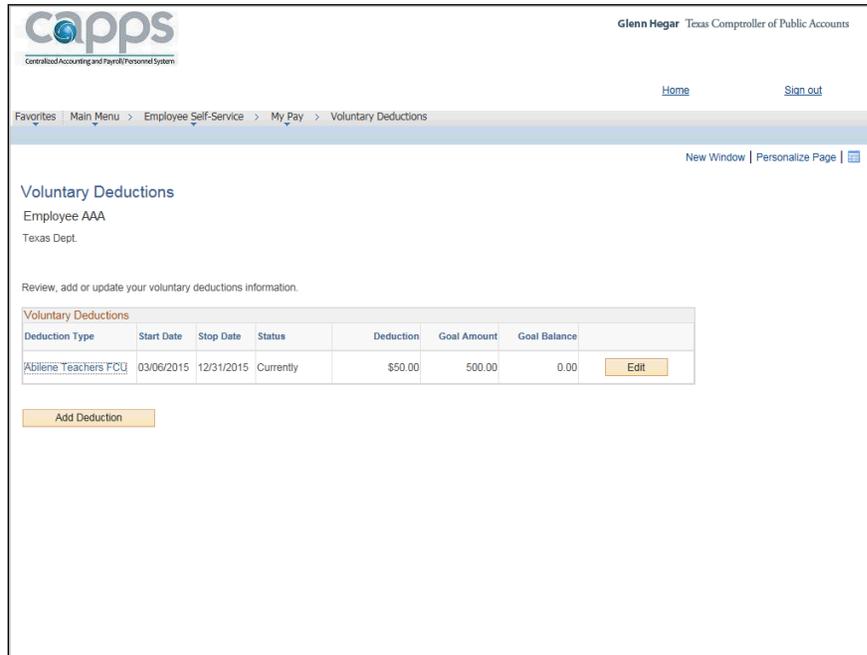
EUT Course



In this lesson you will learn how to add a voluntary deduction with a specific stop date.



Step	Action
1.	Click the My Pay button. 
2.	Click the Voluntary Deductions link. 
3.	Notice how Employee AAA has an existing voluntary deduction to Abilene Teachers FCU. The Deduction field identifies the amount being deducted per pay cycle. The Goal Amount represents the total amount to be deducted. When this amount is reached the deductions will stop. The Goal Balance field represents the total amount deducted to date.



Step	Action
4.	Click the Add Deduction button. 
5.	Click the Look up *Type of Deduction button. 
6.	Click the scrollbar to navigate down the selection list.
7.	Click the United Heritage Credit Union link. 
8.	Click in the Enter Amount to be deducted field. *Enter Amount to be deducted. 
9.	Enter the amount to be deducted into the Enter Amount to be deducted field. In this example enter " 150.00 ". *Enter Amount to be deducted. 

Step	Action
10.	<p>Option 1 - Goal Amount is used to set the total amount to be deducted.</p> <p>Option 2 - Deduction Stop Date is used when you want your deductions to stop on a specific date.</p> <p>Select either Option 1 or Option 2 when entering your Voluntary Deduction.</p>
11.	<p>Note: If you selected Option 1 when setting up your voluntary deduction and need to stop your deduction you can add a Deduction Stop Date.</p>
12.	<p>Note: This lesson is how to add a voluntary deduction with a specific stop date.</p> <p>Click in the Option 2: Enter Deduction Stop Date field.</p> <p>Option 2: Enter Deduction Stop Date (MM/DD/YYYY) <input type="text"/></p>
13.	<p>Enter the date you want the deduction to stop in the Option 2: Enter Deduction Stop Date field.</p> <p>In this example, enter "12/01/2015".</p> <p>Option 2: Enter Deduction Stop Date (MM/DD/YYYY) <input type="text"/></p>
14.	<p>Click the Submit button.</p> <p><input type="button" value="Submit"/></p>
15.	<p>Click the OK button.</p> <p><input type="button" value="OK"/></p>
16.	<p>Note: Should you need to change an existing voluntary deduction use the Edit button.</p>
17.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

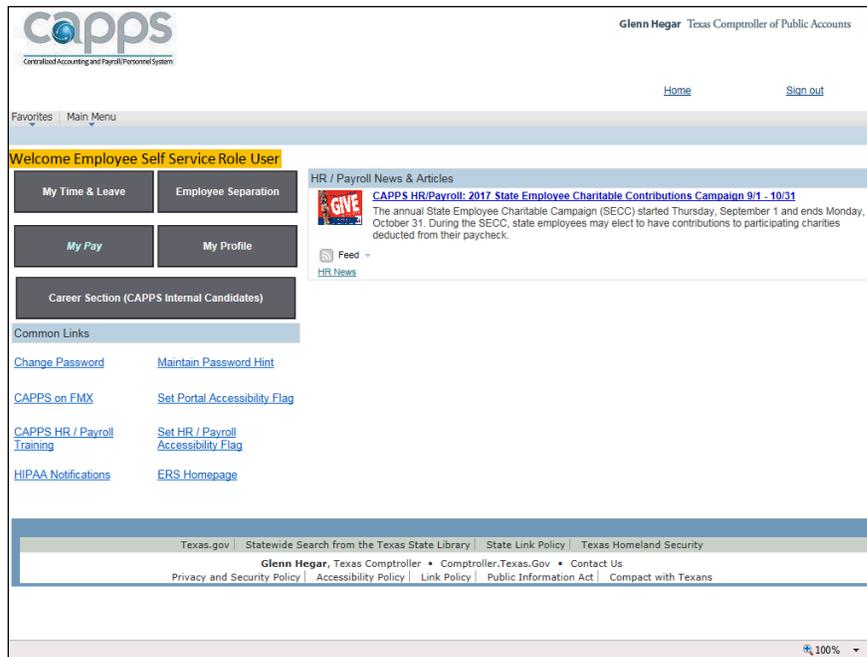
Charitable Deductions

Section 3 - Lesson 3 Exercises - Scenario 2: Charitable Deductions

Procedure

In this lesson you will learn how to add/edit and delete a Charitable Deduction.

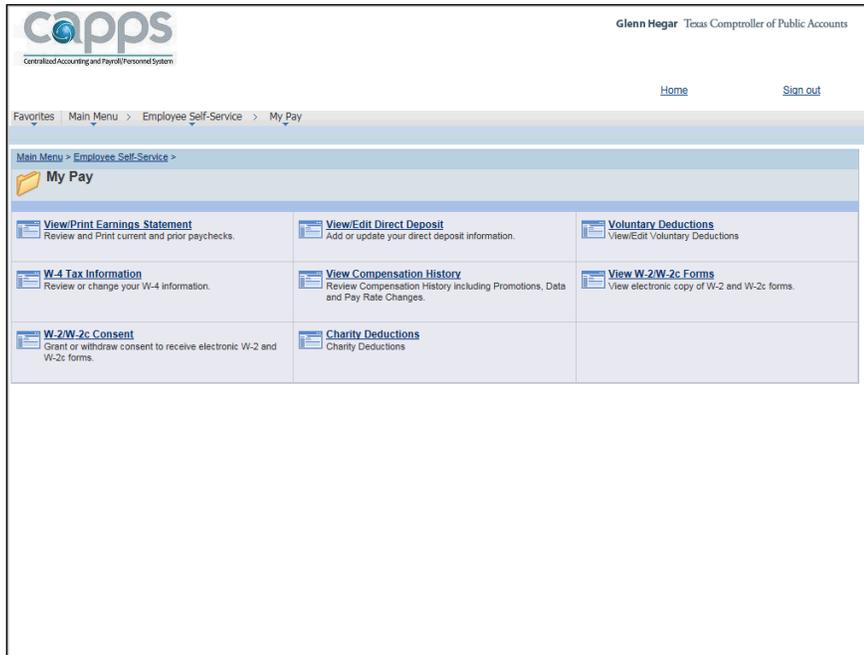
Step	Action
1.	<p>During the Open Enrollment period for Charitable Contributions (Sept. 1 - Oct 31), you will see an option to select the link for State Employee Charitable Contributions (SECC) under HR/Payroll News & Articles.</p> <p>You are also able to select the My Pay button to the left if you choose to use to navigate instead.</p>



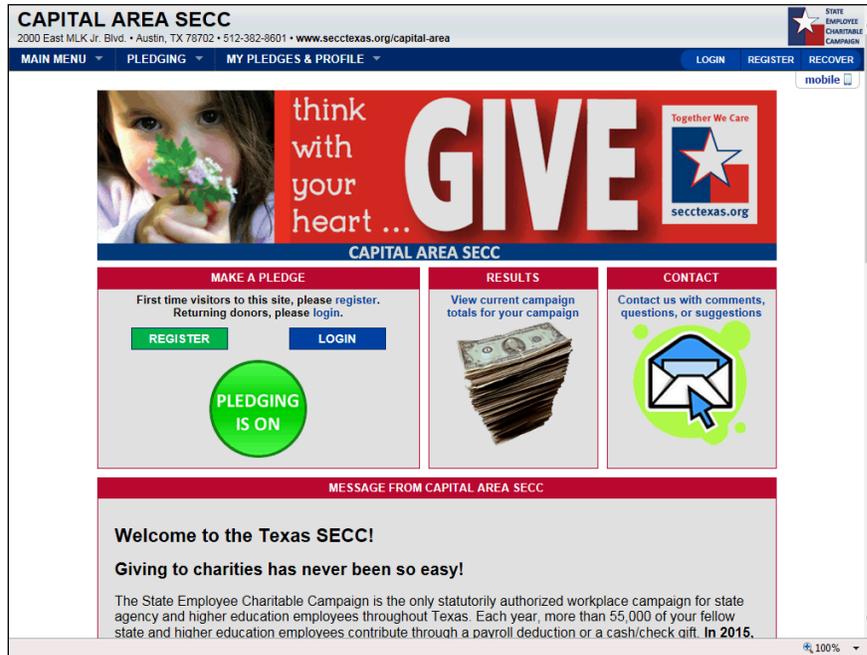
Step	Action
2.	<p>Click the My Pay button.</p> 

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Step	Action
3.	Click the Charity Deductions link. Charity Deductions
4.	Note: Charitable Deductions are taken once a year . A maximum of three, (3) deductions may be selected. You will be directed to a (State Employee Charitable Campaign) site that interfaces with CAPPS . Click the https://www.secctexasgiving.org/ link. https://www.secctexasgiving.org/
5.	This screen lists the Campaign Areas . The names are in alphabetical order. You will select the Campaign Area of your choice and will be taken to the Register and/or Login page. Click the CAPITAL AREA SECC link. CAPITAL AREA SECC

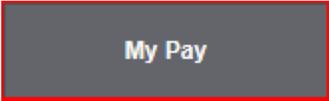


Step	Action
6.	<p>If this is your first time Making a Pledge, you will select the Register button. If not, select the Login button.</p> <p>You will then continue through the Campaign site following the detailed instructions. Those details are not captured in this training.</p> <p>Click the REGISTER button.</p> 
7.	<p>After the enrollment period is over, you have the option to edit or delete an existing Charitable Deduction.</p> <p>The next steps will show you how to edit and delete your deduction.</p>

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Step	Action
8.	Click the My Pay button. 
9.	Click the Charity Deductions link. 
10.	After the election period has closed, you can edit or delete your elections throughout the year. Please review the second paragraph in regards to being a new hire, rehire or transfer.
11.	To change the amount of your election, Click the Edit button. 

Step	Action
12.	<p>The Charitable campaign election(s) will be listed. Edit the monthly amount being deducted.</p> <p>Don't forget to Save your changes!</p> <p>In this exercise, we won't be Saving but will move on to Deleting a deduction.</p>
13.	<p>In order to delete a Charitable election,</p> <p>Click the Delete button.</p> 
14.	<p>Review and respond to the message accordingly.</p> <p>This is an opportunity for you to confirm the Delete. You will not be able to re-add after this point.</p> <p>In this exercise, you will select Cancel.</p> <p>Click the Cancel button.</p> 
15.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Lesson 4 - Tax

Section 3, Lesson 4

View Tax Information

W-4 Tax Information

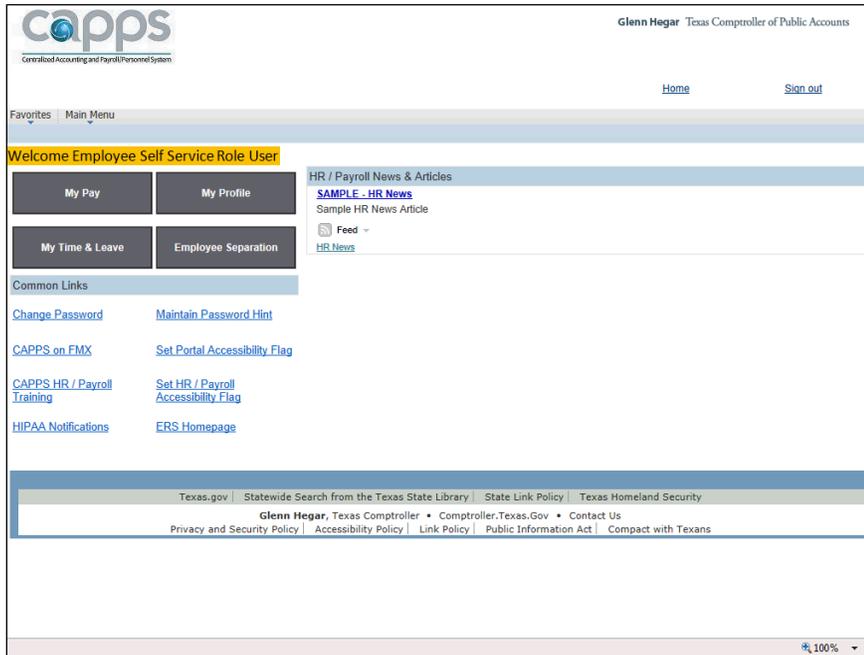
Section 3 - Lesson 4 Exercises - Scenario 1: W-4 Tax Information

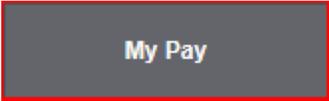
Procedure

In this lesson you will learn how to enter your W-4 tax information in CAPPS.

CAPPS HR/PAYROLL

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Step	Action
1.	Click the My Pay button. 
2.	Click the W-4 Tax Information link. 
3.	Before entering your W-4 tax information you should always validate that your name, social security number, and address information is correct. <u>If your social security number is incorrect</u> , contact your Human Resources office. <u>If your address is incorrect</u> , you can correct (edit) the information in Employee Self Service by navigating to: Self Service > Personal Information > Home & Mailing Address. Use the edit feature (pencil icon) to update your information.

The screenshot shows the 'W-4 Tax Information' page for Employee AAA. The Social Security Number is 999-99-9999. The Home Address is 4321 Baseline Street, AUSTIN, TX 78732. Under 'W-4 Tax Data', the 'Enter total number of Allowances you are claiming' field contains '0' and the 'Enter Additional Amount, if any, you want withheld from each paycheck' field contains '\$0'. The 'Indicate Marital Status' section has 'Single' selected with a radio button. There are two checkboxes: one for 'Check here and select Single status if married but withholding at single rate' (unchecked) and one for 'Check here if your last name differs from that shown on your social security card' (unchecked).

Step	Action
4.	<p>Click in the field and enter the total number of Allowances you are claiming in the field.</p> <p>In this example: Enter "1".</p> <p>Enter total number of Allowances you are claiming <input type="text" value="0"/></p>
5.	<p>Click in the field and enter the additional amount, if any, you want withheld from each paycheck in the field.</p> <p>In this example: enter "50.00".</p> <p>Note: This field is optional.</p> <p>Enter Additional Amount, if any, you want withheld from each paycheck <input type="text"/></p>
6.	<p>The radio buttons here allow you to select either Single or Married status.</p> <p>In this example Single is being used.</p>

Step	Action
7.	<p>Select the check box for 'Check here and select Single status if married but withholding at single rate.' if this is applicable for your tax withholding status.</p> <p>In this example, select the box.</p> <p><input type="checkbox"/> Check here and select Single status if married but withholding at single rate</p>
8.	Click the scrollbar.
9.	For exempt status , read the conditions listed and check the box if applicable.
10.	<p>When you have completed filling out the W-4 tax data, click the Submit button.</p> <p><input type="button" value="Submit"/></p>
11.	<p>You will be asked to enter your password in the Password field.</p> <p>This should be your own unique password. Use the same password that you used to sign-in.</p> <p>In this example: enter "P@\$\$w0rd".</p>
12.	<p>Click the Continue button.</p> <p><input type="button" value="Continue"/></p>
13.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

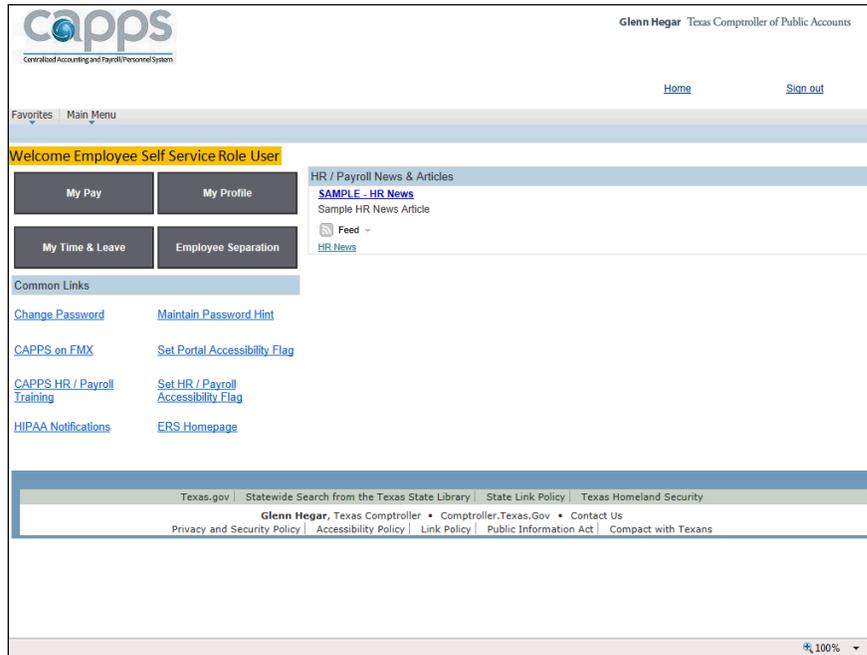
View/Print W-2 and W-2c Information

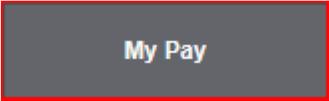
Section 3 - Lesson 4 Exercises - Scenario 2: View/Print W-2 and W-2c Information

Procedure

In this lesson you will learn the following:

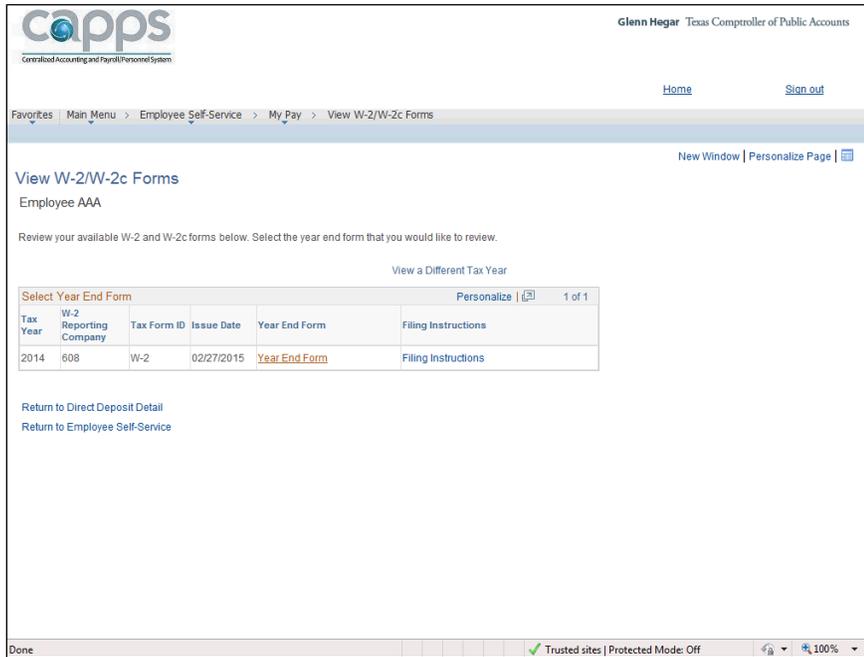
1. How to print a copy of your W-2.
2. How to view filing instructions.



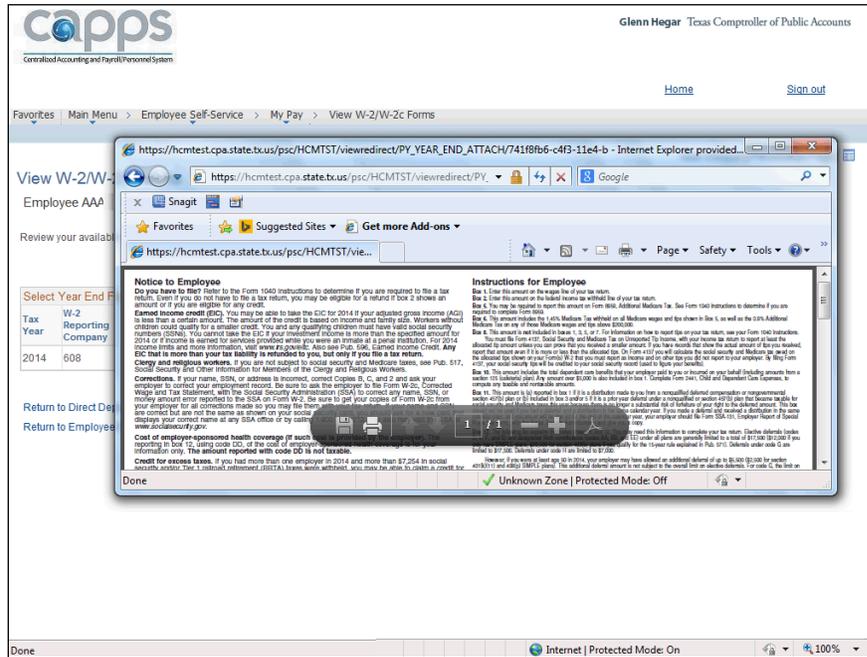
Step	Action
1.	Click the My Pay button. 
2.	First, we will print a copy of your W-2. Click the View W-2/W-2c Forms link. 

CAPPS HR/PAYROLL

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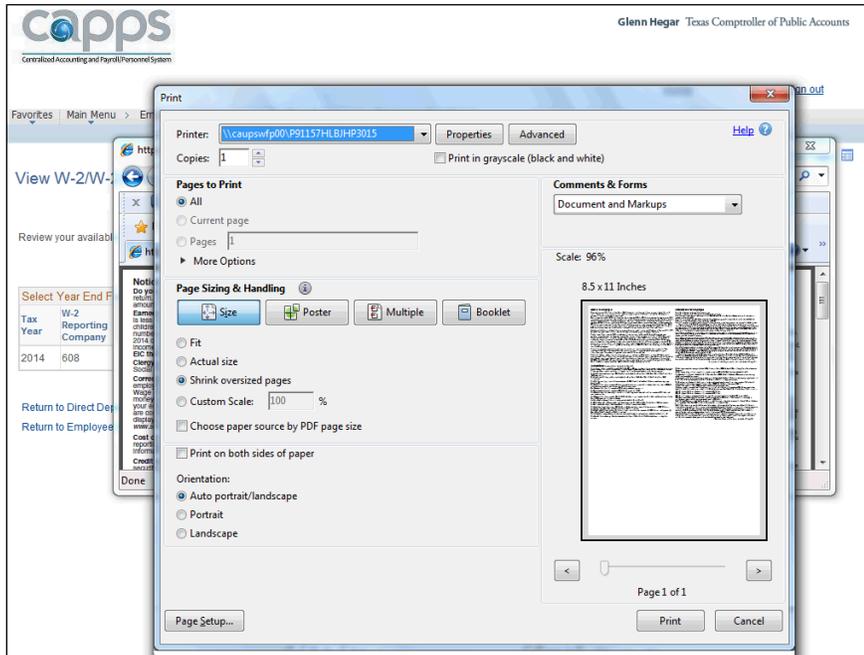


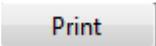
Step	Action
3.	Click the Year End Form link. Year End Form
4.	Your W-2 Form will appear. Note: For security purposes confidential information has been removed.
5.	Click the Print button. 
6.	Now, we will view filing instructions. Click the Filing Instructions link. Filing Instructions
7.	The Filing Instructions document will appear.



The screenshot shows the CAPPS HR/PAYROLL system interface. At the top, it displays the user's name, 'Glenn Hegar', and his title, 'Texas Comptroller of Public Accounts'. Below this, there are navigation links for 'Home' and 'Sign out'. The main content area shows a document titled 'Notice to Employee' and 'Instructions for Employee'. The document is displayed in a browser window with a toolbar containing a 'Print' icon. The document text includes instructions for employees regarding tax returns, earned income credit, and other tax-related information. The browser window also shows the address bar with the URL 'https://hcmtest.cpa.state.tx.us/psc/HCMSTST/viewdirect/PY_YEAR_END_ATTACH/741f8b6-c4f3-11e4-b-'. The browser toolbar includes a 'Print' icon, which is the focus of the instruction in the table below.

Step	Action
8.	To obtain a copy, click the Print icon. 



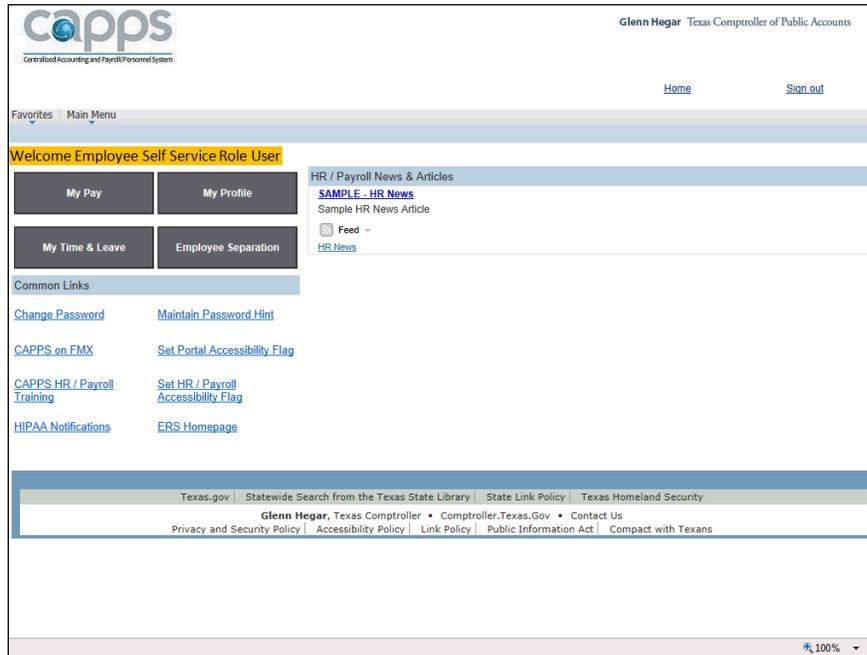
Step	Action
9.	Check to make sure you are printing to the applicable printer, then click the Print icon to continue. 
10.	Congratulations! You have successfully completed this lesson. End of Procedure.

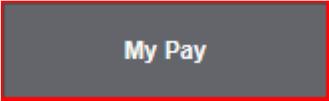
W-2 and W-2c Consent

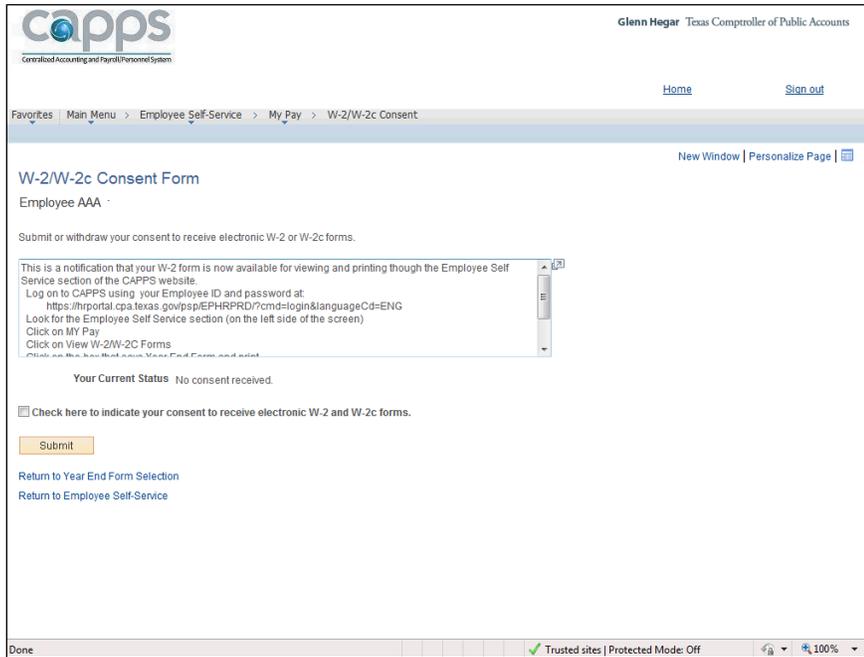
Section 3 - Lesson 4 Exercises - Scenario 3: W-2 and W-2c Consent

Procedure

In this lesson you will learn how to provide consent to receive an electronic W-2 or W-2c Form.



Step	Action
1.	Click the My Pay button. 
2.	Click the W-2/W-2c Consent link. 



Step	Action
3.	Click the scrollbar to view all the content within the description box. 
4.	To receive your W-2 electronically, click the checkbox ' Check here to indicate your consent to receive electronic W-2 and W-2c forms '. Note: You may also uncheck the box to remove consent. 
5.	Click the Submit button. 
6.	Click in the Password field. 

Step	Action
7.	Enter your password (the same password that you logged in with) into the Password field. In this example enter " P@\$w0rd ".
8.	Click the Continue button. 
9.	Congratulations! You have successfully completed this lesson. End of Procedure.

Glossary

ESS ESS stands for Employee Self Service.

MSS MSS stands for Manager Self Service.

SetID SetID is a core value for each agency; it identifies the data-set for that particular agency. A SetID always begins with the letters "TX" followed by the Agency Number (*e.g.*, TX304).

Worklist A Worklist is an organized list of items which require your attention (*e.g.*, approval of one-time merit pay). The system automatically routes an item to the appropriate manager's (or supervisor's) worklist.