CAPPS HR/PAYROLL
End-User Training (EUT)

EUT Course – 101

Fundamentals and
Employee Self-Service

PeopleSoft 9.2

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Employee Self Service

Course 99 Fundamentals and Course 100 Employee Self Service Combined

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Section 1 - CAPPS Fundamentals

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Lesson 2 - How to Access CAPPS

Section 1, Lesson 2

CAPPS Fundamentals

Learn how to sign-in to the CAPPS system

Section 1 - Lesson 2 Exercises - 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 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.

Step 2. The Login page is where you will enter your User ID and Secure Password in the appropriate fields.

If you do not have this information, please contact your agency password support personnel.

The Secure Password is Case Sensitive. As you enter your password, the system will mask your entry with asterisks.

Step 3. Once you have entered the User ID and Secure Password you will click the Sign In button.

Step 4. This page contains the CAPPS Enterprise Portal. The views on the Portal will vary according to individual security roles.

Next you will take a look at each of the components within the Enterprise Portal.

Step 5. 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.

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.

Step 6. Below the HR/Payroll application link are the **Employee Self-Service** and **Manager Self-Service links**.

The **Self-Service** options are available to all employees.

Step 7. The **Manager Self-Service links** are available to any employee with a role as a Manager in the system.

Remember the application links will appear according to the user profile.

Step 8. The Worklist will only appear for users that have Worklist items.

In this example, the user has an **HR/Payroll Worklist**.

Step 9. **Common Links** are static and will appear for everyone.

Notice the link to **Change Password**.

Step 10. **Other Portal Links** are for users specifically granted access to UAT, Maintenance, and Sandbox.

Step 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.

Step 12. Next you will see how the **Main Menu** can be used as an alternate way to access the same information.

Step 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.

Step 14. You can access **Employee Self-Service** from here as well.

Step 15. After selecting the **HR/Payroll link**, you will see the CAPPS HR/Payroll Menu options.

Step 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.

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

Step 18. Note that you can go to (Employee) **Self Service** or **Manager Self Service** from this **Main Menu** list as well.

Most employees will see a limited number of choices when they login to the CAPPS HR/Payroll system.

Step 19. Because of security requirements, CAPPS logs you out of your application after a period of inactivity.

A few minutes prior to timing out, the system provides a popup warning telling you that your browser session is about to end.

If you click **OK**, though, the timer is reset, and your current session continues.

Step 20. Congratulations! You have successfully completed this lesson.

End of Procedure.

Learn how to change your password

Section 1 - Lesson 2 Exercises - 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 1.	**CAPPS HR/Payroll Password Reset**. If you have forgotten your password, contact your agency password support personnel. You will be sent a temporary password.
Step 2.	You will receive a temporary password in an email.
Step 3.	Enter your **User ID** and temporary **Password** to start the process of changing your password. In this example, you have entered your **User ID** and **Secure Password** already.
Step 4.	The system tells you that your temporary password has expired. Click on the link to change your password. Click the **Change Password** link.
Step 5.	Enter the temporary password (the one you received in an email) in the ***Current Password** field.
Step 6.	Enter a ***New Password**, and enter it again in the ***Confirm Password** field. Click the **Change Password** link.
Step 7.	The system confirms that your password has been changed.
Step 8.	**How to Set Up Password Hints**
Step 9.	In **CAPPS HR/Payroll** you can set up a password hint so that you can reset your own password. On the **Portal** page, you would select the **Maintain Password Hint** link under the Common Links section.

Step 11. The system asks you to select a question from the drop down list.

In this example, your question will be *"What was the name of your first pet?"* You may use the drop down arrow to select a different question. The **Response** must be at least 5 characters long.

After selecting your question, entering your response information, you will click the **Save** button.

Step 12. **Manual Password Reset**

You can also manually reset your own password. This method assumes that you are already logged into the CAPPS Enterprise Portal.

You would click the **Change Password** link near the bottom under Common Links.

Step 13. Enter your current password in the ***Current Password** field.

Enter a ***New Password**, and enter it again in the ***Confirm Password** field.

Click the **Change Password** link.

Step 14. The system confirms that your password has been changed.

Step 15. **How to use "I forgot/Change my password."**

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.

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.

Step 16. To begin, click the I **forgot/Change my password** link on the CAPPS login page.

Step 17. Enter your **User ID**, and then click on the **Continue** button.

Step 18. The system asks you for the **Response** to your Password Hint that you previously set up.

You then click on the **Email New Password** button.

Step 19. If your **Response** is valid, the system will email you (to the email address on file) a temporary password.

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.

Step 20. The system sends you an email.

Step 21. Enter your **User ID** and temporary **Password** to start the process of changing your password.

In this example, we have entered your **User ID** and **Secure Password** already.

Step 22. The system tells you that your temporary password has expired.

Click on the link to change your password.

Click the **Change Password** link.

Step 23. Enter the temporary password (the one you received in the email) in the ***Current Password** field. Enter a ***New Password**, and enter it again in the ***Confirm Password** field.

Click the **Change Password** link.

Step 24. The system confirms that your password has been changed.

Step 25. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Lesson 3 - Using CAPPS Navigation Features

Section 1, Lesson 3

Using CAPPS Navigation Features

Learn how to add and delete Favorites

Section 1 - Lesson 3 Exercises - Scenario 1: Learn how to add and delete Favorites

Procedure

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

Step 1. The CAPPS HR/Payroll browser-based interface contains navigation elements that are the same as those found in other CAPPS applications.

After you sign in to CAPPS, your **Home** page appears.

Step 2. A **universal navigation header** will be displayed at the top of every page. This header generally contains the following links:

- **Home**
- **Worklist**
- **Add to Favorites**
- **Sign out**

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.

Step 3. Selecting the **Home** link will automatically return you this page.

Step 4. 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.

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. The **Worklist** page provides summary information about all items on your personal worklist.

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.

If you are involved in approving items, those approvals will be worked from the Worklist.

Step 5. **Add to Favorites** is a feature similar to a browser bookmark; use it for frequently used folders and content pages.

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.

Step 6. 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.

Clicking a link from the **Favorites** menu is a direct path to the page, and will bypass menu navigation.

Click the **Favorites** button.

Step 7. The **Favorites** menu has two sections.

The top section will list **Recently Used** pages, or pages that you have accessed.

The bottom section allows you to Add or Edit your **My Favorites** list.

This example shows that you recently accessed the **Location** page.

Step 8. To add a page to the **Favorites** menu, navigate to the page to be added, then click the **Add to Favorites** link.

In this example you have already navigated to the **Location** search page. From the **Location** search page, click the **Add to Favorites** link.

Step 9. You can either accept the default **Description**, or enter your own description for this page.

In this example, accept the default description of **Location**.

Click the **OK** button.

Step 10. The system displays a message telling you that the favorite has been saved.

Step 11. Click the **OK** button.

Step 12. Click the **Favorites** button to see if **Location** was added to your list of favorites.

Step 13. Notice how **Location** has been added to the **My Favorites** section of the **Favorites** menu.

Step 14. You can change the name of a **Favorite** or delete one from the list.

Click the **Edit Favorites** menu item.

Step 15. To edit the name of a **Favorite**, simply replace the entry 'Location' with one of your own choosing, and then hit the **Save** button.

Step 16. To delete a favorite, click the minus sign (**-**) next to the favorite to be deleted.

Click the **Delete row 1** button.

Step 17. The system asks you to confirm your deletion. You have the option, of course, to cancel this deletion.

Confirm deletion by clicking the **OK** button.

Step 18. Save your work.

Click the **Save** button.

Step 19. You will see that **Location** was removed from the **My Favorites** list.

Click the **Favorites** button.

Step 20. Notice how **Location** is no longer listed under **My Favorites**.

(Note that **Location** still appears on the **Recently Used** list.)

Step 21. Be sure to **Sign Out** of the CAPPS when you are done.

Step 22. Congratulations! You have successfully completed this lesson.
End of Procedure.

Lesson 4 - Using the Search Feature to retrieve information

Section 1, Lesson 4

Using the Search Feature to Retrieve Information

Learn how to use the Basic search feature

Section 1 - Lesson 4 Exercises - 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 1. The page displayed on the screen is the **Basic Search** page.

There are two tabs on this page:

1. Find an Existing Value
2. Add a New Value.

The **Find an Existing Value** tab allows you search for information according to a particular value or values.

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.

Step 2. Typically, a **Basic Search** page offers one field (or at most two fields) with which you may search for data.

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.

In this example you will use the **Basic Search** feature to search on **SetID = TX032.**

Click the **Search** button.

Step 3. 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.

Step 4. On a **Basic Search** page, you have the option of changing the search criteria.

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.

Click the dropdown arrow to the right of the **Search by** field.

Step 5. Notice the other fields that you may use as Search Criteria. The search criteria options may vary depending on the navigation used.

Step 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.

Step 7. **Next in List** takes you to the next item from the **Search Results** Grid.

Step 8. To return to the Search Results grid or to start a new Search, click the **Return to Search** button.

Step 9. Congratulations! You have successfully completed this lesson.
End of Procedure.

Learn how to use Operators and Wildcards

Section 1 - Lesson 4 Exercises - Scenario 2: Learn how to use Operators and Wildcards

Procedure

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

Step 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 2. 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.)

On an **Advanced Search** page different operators in multiple fields can be used.

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.

Enter the desired information into the **Empl ID begins with** field. Enter "**0**".

Step 3. There could be hundreds (or thousands) of **Empl IDs** beginning with zero.

It's known that the employee's Name begins with test.

Enter the desired information into the **Name** field. Enter "**test**".

Step 4. Click the **begins with** for **Last Name** dropdown list.

Step 5. Here is a complete list **of Operators** for use in searching a field; not all operators are appropriate for all types of fields.

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.

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.

Step 6. **= (Equals):** search ***any field*** for an exact match using a string of characters; the system finds values that ***exactly*** match the string of characters.

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.

Step 7. **< (less than):** search ***any field*** using a string of characters; the system finds values that are ***less than*** the string of characters.

<= (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.

> (greater than): search ***any field*** using a string of characters; the system finds values that are ***greater than*** the string of characters.

>= (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.

Step 8. **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.

Step 9. **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.

Step 10. The last name **contains** the letters "rp".

Click the **contains** list item.

Step 11. Enter the desired information into the **Last Name contains** field. Enter "**rp**".

Step 12. The search criteria are:

Empl ID begins with '0'
Name begins with 'test'
Last Name contains 'rp'

Click the **Search** button to find the record(s) that match these values.

Step 13. Nine records are displayed in the **Search Results** grid matching these search criteria.

Step 14. If the search criteria is for a search that might be used again, save the search.

Click the **Save Search Criteria** link.

Step 15. The system displays the **Save Search As** page. Note that this page lists the criteria that will be saved for this search.

Give the search a meaningful name.

Enter the desired information into the **Name of Search:** field.

Enter "**Personal Info 0 TEST RP**".

Step 16. Click the **Save** button.

Step 17. The system will confirm that it saved your search.

Click the **Return to Advanced Search** link.

Step 18. 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).

Step 19. 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.

Step 20. To clear all fields of any search criteria, click the **Clear** button.

Click the **Clear** button.

Step 21. 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***.

Step 22. For example, using the underscore character, search fr this string:

"st_ve"

and the system might find the values:

Steve
stove

Step 23. To use the percent sign character, search for this string:

"st%"

and the system might find the values:

Steve
stove
Stephanie
ST

Notice that the last value ST, is found because the % character can also mean "no characters".

Step 24. 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.

Enter the desired information into the **Empl ID** field. Enter "**0%99**".

Step 25. Click the **Search** button.

Step 26. The system finds three rows of data:

Empl ID 00000000099 and
Empl ID 00000000199 and
Empl ID 00000000299.

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.

Step 27. Click the **Clear** button.

Step 28. While the percent sign matches one or more characters, the underscore wildcard matches a single character only.

Step 29. Enter the desired information into the **Empl ID** field. Enter "**0_99**".

Step 30. Click the Search button.

Step 31. 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."

Step 32. Click the **Clear** button.

Step 33. Enter the desired information into the **Empl ID** field.

Enter "**000000002_1**".

Step 34. Click the **Search** button.

Step 35. The system found six rows of data.

00000000201
00000000211
00000000211 (it found this value twice, because this Empl ID exists in two separate Business Units)
00000000221
00000000251
00000000261

In all cases, there is a single digit between '000000002 and 1 in the **Empl ID**.

Step 36. 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
- 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 1. Click the **My Time & Leave** button.

Step 2. Click the **Employee TimeSheet** link.

Step 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 4. Click the **Search** button.

Step 5. **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.

Other data contained in this training is fictitious and used for training purposes only.

Step 6. The top portion of the Timesheet contains the employee's Leave Balance information.

Current - Balance including pending approval
Pending Approval - Hours requested to be used, but not approved
Available - Current balance minus anything that is pending approval

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.

Note: Leave accruals are added to your current balance on the first work day of the month.

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.

Step 7. The center of the timesheet displays the 31 day period that you selected on the search page.

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.

Step 8. The assigned work schedule will appear on the timesheet for an Exception Time Reporter as illustrated on the screen.

Earlier in the lesson, you learned that Positive Time Reporters will not have a schedule on the Timesheet.

Step 9. You will use Time Reporting Codes (TRCs) to report what type of time is being entered on the timesheet.

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.

Step 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.

Step 11. Click the bottom scrollbar to navigate across the page.

Step 12. You should use the "Override Reason" code only 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.

Step 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.

Step 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 15. The **Comments** field is available for use by both the employees and managers can enter information, as needed.

It is important to note that both the employee and their manager can read the contents in the comment field.

Step 16. The **Delete** button will remove the entire row of time.

However, once the employee selects the **E-Sign & Submit** button, the delete button will no longer be available.

Click the bottom scrollbar to navigate back across the page.

Step 17. Click on the scroll bar to navigate to the bottom of the page.

Step 18. The **Previous** button will display the previous month (31 days).

Step 19. The **Next** button will display the next month (31 days).

Step 20. The **View Leave Balances** link will provide detailed information for all the employees leave plans also known as comp time plans.

Click the **View Leave Balances** link.

Step 21. The **Leave Time Balance Summary** page will appear.

This screen is displaying the details for ONLY one leave plan, (ADMINLEAVE) or Administrative Leave.

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.)

Step 22. Click the **Show next row** button.

Step 23. Notice how the display changed to 2 of 15. The system is displaying the second record of the total fifteen records.

Step 24. Notice how the display changed to 2 of 15. The system is displaying the second record of the total fifteen records.

Step 25. Click the **Show Time Expiring in** list.

Step 26. You can select any of the options to view expiring leave time.

Step 27. Click the **View All** link.

Step 28. Click the scrollbar to navigate down the page.

Step 29. Click the scrollbar to continue to navigate down the page.

Step 30. 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 31. Click the scrollbar to navigate back to the top of the page.

Step 32. Click the **View 1** link to go back to viewing only one leave plan.

Step 33. Click the **Return to Employee Timesheet** link.

Step 34. Congratulations! You have successfully completed this lesson.

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 1. Click the **My Time & Leave** button.

Step 2. Click the **Employee TimeSheet** link.

Step 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 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 4. Use the Calendar icon to change the date to the applicable month.

In this example you will be changing the date to April 1, 2015.

Click the **Calendar** icon.

Step 5. Click the dropdown arrow to the month
.

Step 6. Click **April** from the list.

Step 7. Click the first day of the month.

Step 8. Click on the "**1**" link.

Step 9. Click the **Search** button.

Step 10. Entering time for a Positive Time Reporter is a three-step process.

1. Select the applicable Time Report Code (TRC).
2. Enter the hours worked or leave time taken.

3. Select the E-Sign & Submit button

Step 11. **Step 1** - Select the applicable Time Report Code (TRC).

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.

Start by clicking the Look up Time Reporting Code button.

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

Step 13. Select the TRC for Regular Hours Worked.
Click the **REGHR** link.

Step 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.

Step 15. Enter "**8**" in the Thu 4/2 field.

Step 16. Enter "**8**" in the Fri 4/3 field.

Step 17. Enter "**8**" in the Mon 4/6 field.

Step 18. Enter "**8**" in the Tue 4/7 field.

Step 19. Enter "**8**" in the Wed 4/8 field.

Step 20. Enter "**8**" in the Thu 4/9 field.

Step 21. Enter "**8**" in the Fri 4/10 field.

Step 22. Enter "**8**" in the Mon 4/13 field

Step 23. Enter "**8**" in the Tue 4/14 field.

Step 24. Enter "**8**" in the Wed 4/15 field

Step 25. You will enter hours worked for the second half of the month by using the REGHR TRC again.

You can either type it in the field or select the Look up Time Reporting Code button.

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

Step 27. Select the TRC for Regular Hours Worked.
Click the **REGHR** link.

Step 28. Enter "**8**" in the Thu 4/16 field.

Step 29. Enter "**8**" in the Fri 4/17 field.

Step 30. Enter "**8**" in the Mon 4/20 field.

Step 31. Enter "**8**" in the Tue 4/21 field.

Step 32. Enter "**8**" in the Wed 4/22 field.

Step 33. Enter "**8**" in the Thu 4/23 field.

Step 34. Enter "**8**" in the Fri 4/24 field.

Step 35. Enter "**8**" in the Mon 4/27 field.

Step 36. Enter "**8**" in the Tue 4/28 field.

Step 37. Enter "**8**" in the Wed 4/29 field.

Step 38. Enter "**8**" in the Thu 4/30 field.

Step 39. Enter "**8**" in the Fri 5/1 field.

Step 40. **Step 3** - Select the E-Sign & Submit button. 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.

Step 41. Congratulations! You have completed the lesson.

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.

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

Step 2. Click the **Employee TimeSheet** link.

Step 3. Click the button to the right of the field

Step 4. Click **April** from the menu.

Step 5. Click the '**1**' link for the first of the month.

Step 6. Click the **Search** button.

Step 7. Click the **Look up Time Reporting Code (Alt+5)** button.

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

Step 9. Click the **Regular Hours Worked** link.

Step 10. Enter the actual hours worked into the **Mon 4/6** field.
Enter "**8.00**".

Step 11. Enter the actual hours worked into the **Tue 4/7** field.
Enter "**10.00**".

Step 12. Enter the actual hours worked into the **Wed 4/8** field.
Enter "**10.00**".

Step 13. Enter the actual hours worked into the **Thu 4/9** field.
Enter "**8.00**".

Step 14. Enter the actual hours worked into the **Fri 4/10** field.
Enter "**8.00**".

Step 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.

Step 16. Click the **OK** button.

Step 17. Congratulations! You have completed this lesson.

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 1. Click the **My Time & Leave** button.

Step 2. Click the **Employee TimeSheet** link.

Step 3. Click the **Choose a date (Alt+5)** button.

Step 4. Click the drop down arrow.

Step 5. Click **April** from the list.

Step 6. Click the '**1**' link for the first of the month.

Step 7. Click the **Search** button

Step 8. Positive Time Reporters need to enter hours worked and leave hours taken. Click the **Look up Time Reporting Code (Alt+5)** button.

Step 9. Click the **Annual Leave Taken** link.

Step 10. Enter the annual leave taken into the Mon 4/20 field. In this example enter "4.00".

Step 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.

Step 12. Click the **Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015** button.

Step 13. Click the **Look up Time Reporting Code (Alt+5)** button.

Step 14. Click the scrollbar to navigate down the list.

Step 15. Click the **REGHR** link.

Step 16. Enter the hours that were actually worked into the **Mon 4/20 0.00** field. Enter "**4.00**".

Step 17. Notice how two lines are now displayed. One for Annual Leave Taken, and one for Regular Hours Worked

Step 18. Click the scrollbar to navigate down the page.

Step 19. Click the **E-Sign & Submit** button

Step 20. Click the **OK** button.

Step 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.

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

Step 2. Click the **Employee TimeSheet** link.

Step 3. Make sure that you are on the correct month. If not, change the date to the first day of the correct month.

Step 4. Click the **Search** button.

Step 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

Step 6. Click the **Add a New Line ...** button.

Step 7. When adding additional time worked you need to add your scheduled hours and the additional hours worked.

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.

The total Regular Hours worked will be eight scheduled hours plus two overtime hours for a total of 10 hours.

Step 8. The Time Reporting Code for Overtime/Comp /Time is 'REGHR'.

Exempt and Non-exempt employees will both enter additional hours worked in the same way.

- Exempt employee's time will bank as Comp Time Earned.
- Non-Exempt employee's time will bank FLSA Overtime.

Enter the TRC "REGHR"

Step 9. Enter the hours worked into the **Mon 3/9 8.00** field.

In this example you would enter "**10**". *(i.e., eight regular hours worked plus two overtime hours worked).*

Step 10. Enter the hours worked into the **Tue 3/10 8.00** field. Enter "**10**".

Step 11. The employee worked their regular scheduled hours for the remainder of the week. Therefore, no additional time entry was required.

Step 12. Click the scrollbar to navigate to the bottom of the page.

Step 13. Click the **E-Sign & Submit** button.

Step 14. Click the OK button.

Step 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.

Step 16. Congratulations! 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 1. Click the **My Time & Leave** button.

Step 2. Click the **Employee TimeSheet** link.

Step 3. Click the **Choose a date (Alt+5)** button.

Step 4. Click drop down arrow.

Step 5. Click **April** from the list.

Step 6. Click the '**1**' link to display the whole month of April.

Step 7. Click the **Search** button.

Step 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.

Step 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.

Step 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.

Step 11. Click the Look up **Time Reporting Code (Alt+5)** button.

Step 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.

Step 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 14. The employee needs to use the **REGHR** Time Reporting Code to indicate that he is working on Saturday.

Click the Add a New Line for **Wednesday 04/01/2015 to Wednesday 04/15/2015** button.

Step 15. Click the Look up **Time Reporting Code (Alt+5)** button.

Step 16. Click the scrollbar to navigate down the list.

Step 17. The time worked on the unscheduled day will be charged to regular time.

Click the **REGHR** link.

Step 18. Enter the eight hours worked on the **REGHR** line in the **Sat 4/4** field.

Enter "**8**".

Step 19. The employee's timesheet now reflects the time worked on the unscheduled day and the time not worked on the scheduled day.

Step 20. Click the **E-Sign & Submit** button.

Step 21. Click the **OK** button.

Step 22. Congratulations! You have successfully completed this lesson. **End of Procedure**

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 1. Click the **My Time & Leave** button.

Step 2. Click the **Employee TimeSheet** link.

Step 3. Click the **Search** button.

Step 4. Click the **Look up Time Reporting Code (Alt+5)** button.

Step 5. Click the **ANLVT** link for Annual Leave Taken

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

Step 7. Enter the hours for Annual Leave Taken into the **Mon 3/16** field. Enter "**8.00**".

Step 8. Click the scrollbar to navigate down the page.

Step 9. Click the **E-Sign & Submit** button.

Step 10. Click the **OK** button.

Step 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 1.	Click the **My Time & Leave** button.
Step 2.	Click the **Employee TimeSheet** link.
Step 3.	Access the Timesheet for the correct pay period. Click the **Choose a date (Alt+5)** button.
Step 4.	Click the drop down arrow.
Step 5.	Click **April** from the list.
Step 6.	Click the '**1**' link to view the entire month.
Step 7.	Click the **Search** button.
Step 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.
Step 9.	Click the **Look up Time Reporting Code (Alt+5)** button.
Step 10.	Scroll down to the Time Reporting Code "SICKT". Click the scrollbar.
Step 11.	Click the **SICKT** link.
Step 12.	Enter the sick hours taken into the **Mon 4/6** field. Enter "**4.00**".
Step 13.	Click the **E-Sign & Submit** button.
Step 14.	Click the OK button.

Step 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 16. Congratulations! You have successfully completed this lesson.

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 1. Click the **My Time & Leave** button.

Step 2. Click the **Employee TimeSheet** link.

Step 3. Click the **Search** button.

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

Step 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.

Step 6. Click the **Look up Time Reporting Code (Alt+5)** button.

Step 7. Choose the Time Reporting Code for Compensatory Time (Comp Time) Taken. Click the **COMPT** link.

Step 8. Enter the Comp Time hours taken into the **Tue 3/17** field.

Enter "**8.00**".

Step 9. Click the scrollbar to navigate down the page.

Step 10. Click the **E-Sign & Submit** button.

Step 11. Click the **OK** button.

Step 12. Once the timesheet is 'E-Sign and Submitted', the eight hours of Regular Comptime will appear in the Pending Approval row of the Leave Balances section of the timesheet.

The Available Balance reflects the Current - the Pending Approval hours.

In this example: 26.50 (Current) – 8.00 (Pending Approval) = 18.50 (Available).

Step 13. Congratulations! You have successfully completed this lesson.

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.

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

Step 2. Click the **Employee TimeSheet** link

Step 3. Click the **Choose a date (Alt+5)** button.

Step 4. Click the drop down arrow.

Step 5. Click **April** from the list.

Step 6. Click the **'1'** link to view the whole month.

Step 7. Click the **Search** button

Step 8. The employee is going to use FLSA Overtime to take a day off

Step 9. Click the **Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015** button.

Step 10. Click the **Look up Time Reporting Code (Alt+5)** button

Step 11. The Time Reporting Code for Banked Overtime Taken is "FLSAT". Click the **FLSAT** link.

Step 12. Enter the leave hours into the **Wed 4/1** field. Enter "**8.00**".

Step 13. Click the scroll bar.

Step 14. Click the **E-Sign & Submit** button.

Step 15. Click the **OK** button.
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.

Step 16. 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 1. Click the **My Time & Leave** button.

Step 2. Click the **Employee TimeSheet** link

Step 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.

Step 4. Click the button to the right of the field.

Step 5. Click the **April** list item

Step 6. Click the **1** link.

Step 7. Click the **Search** button.

Step 8. Click the scroll bar.

Step 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.

Step 10. Click the **Look up Time Reporting Code (Alt+5)** button.

Step 11. Various Leave Without Pay options are available. You would select the option that is applicable to your situation. Click the **LWPEO** link.

Step 12. In this example, we will select the Leave Without Pay - Employee (LWPEO) option.

Step 13. Enter the scheduled hours not worked into the **Thu 4/16** field. Enter "**8.00**".

Step 14. Enter the scheduled hours not worked into the **Thu 4/17** field. Enter "**8.00**".

Step 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.

Step 16. Click the **OK** button.

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

Step 2. Click the **Employee TimeSheet** link.

Step 3. Click the **Search** button.

Step 4. Annual Leave taken has already been entered on the Timesheet.

Step 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.

Step 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.

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

Step 8. Click the **SICKT** link.

Step 9. Enter the sick leave hours into the **Wed 3/18** field. Enter "**4.00**".

Step 10. Click the scrollbar to navigate down the page.

Step 11. Click the **E-Sign & Submit** button.

Step 12. Click the **OK** button.

Step 13. Congratulations! You have successfully completed this lesson.

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.

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

Step 2. Click the **Employee TimeSheet** link.

Step 3. Click the **Choose a date (Alt+5)** button.

Step 4. Click the drop down arrow.

Step 5. Click **May** from the list

Step 6. Click the '**1**' link to display the entire month.

Step 7. Click the **Search** button.

Step 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.

Click the **Look up Time Reporting Code (Alt+5)** button.

Step 9. Click the scrollbar to navigate down the list.

Step 10. Click the **REGHW** link.

Step 11. Enter the number of hours that the employee worked on the holiday into the **Mon 5/25** field. Enter "**5.00**".

Step 12. Click the scrollbar to navigate down the page.

Step 13. Click the **E-Sign & Submit** button.

Step 14. The system reminds you that this is a holiday. Click the **OK** button.

Step 15. Click the **OK** button.

Step 16. There are other options relating to Holiday hours:

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).

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.)

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

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 1. Click the **My Time & Leave** button.

Step 2. Click the **Employee TimeSheet** link.

Step 3. Click the **Search** button.

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

Step 5. The employee has to add a new line to enter the Time Reporting Code for the optional holiday. Click the **Add a New Line for Monday 03/16/2015 to Tuesday 03/31/2015** button.

Step 6. Click the **Look up Time Reporting Code (Alt+5)** button.

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

Step 8. The correct Time Reporting Code for an optional holiday is OHCPT. Click the **OHCPT** link.

Step 9. Enter the hours into the **Tue 3/31** field. Enter "**8.00**".

Step 10. Click the **E-Sign & Submit** button

Step 11. Click the **OK** button.

Step 12. Notice the Optional Holiday information at the top of the timesheet with the Leave Balances.

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.

Step 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 14. The employee worked on San Jacinto Day so the -8 balance will move back to zero. Click the **My Time & Leave** button.

Step 15. Click the **Employee TimeSheet** link.

Step 16. Click the **Search** button.

Step 17. Click the **Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015** button.

Step 18. Enter the desired information into the **Time Reporting Code** field. Enter "**REGOH**".

Step 19. Enter the desired information into the **Tue 4/21 8.00** field. Enter "**8**".

Step 20. Click the **E-Sign & Submit** button.

Step 21. Click the **OK** button.

Step 22. Click the **OK** button.

Step 23. Click the **OK** button.

Step 24. After the hours have been approved by the manager and have been process through Time Administration the Optional Holiday hours show 0.

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

Step 2. Click the **Employee TimeSheet** link.

Step 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.

Step 4. Click the **Search** button.

Step 5. **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

Step 6. Click the **Add a New Line for ...** button.

Step 7. Click the **Look up Time Reporting Code (Alt+5)** button.

Step 8. Click in the **Time Reporting Code** field.

Step 9. To shorten your search, enter the first few letters of the **Time Reporting Code** field. Enter "**reg**".

Step 10. Click the **Look Up** button.

Step 11. Click the **REGHR** link.

Step 12. Click in the **Mon 4/6** field.

Step 13. Enter the hours worked into the **Mon 4/6** field. Employee AAA worked his/her scheduled hours. Enter "**8**”.

Step 14. Click in the **Tue 4/7** field.

Step 15. Enter the hours worked into the **Tue 4/7** field. Employee AAA worked his/her scheduled hours. Enter "**8**".

Step 16. Click the scrollbar to navigate across the page.

Step 17. Click the **Look up Labor Account Code (Alt+5)** button.

Step 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.

Step 19. Click the scrollbar to navigate back across the page.

Step 20. Click the scrollbar to navigate down the page.

Step 21. Click the **E-Sign & Submit** button.

Step 22. Click the **OK** button.

Step 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)

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

Step 2. Click the **Employee TimeSheet** link.

Step 3. Click the **Search** button.

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.

Step 4. Click the **Add a New Line for** ... button.

Step 5. Click the **Look up Time Reporting Code** (Alt+5) button.

Step 6. Click in the **Time Reporting Code** field.

Step 7. To shorten your search, enter the first few letters of the **Time Reporting Code** field. Enter "re"

Step 8. Click the **Look Up** button.

Step 9. Click the **REGHR** link.

Step 10. 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**".

Step 11. Click in the **Thu 4/9** field.

Step 12. 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**".

Step 13. Click in the scrollbar to navigate across the page.

Step 14. Click the **Look up Labor Account Code** (Alt+5) button.

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.

Step 15. Click the scrollbar to navigate back across the page.

Step 16. Click the scrollbar to navigate down the page.

Step 17. Click the **E-Sign & Submit** button.

Step 18. Click the **OK** button.

Step 19. You just learned how to allocate hours worked to two separate Labor Account Codes (Project 1 and Project 2).

Step 20. What if you worked only partial hours toward your LAC. How would you enter your time?

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.
In this case, the employee will need to enter his/her hours on two separate lines on the Timesheet grid.

Line 1: Employee AAA will add a new line, enter the TRC REGHR, enter the 3 hours worked on the timesheet, and select the applicable LAC.

Line 2: Employee AAA will add a new line, enter the TRC REGHR, enter the remaining 5 hours worked, and leave the LAC field blank.

Step 21. Congratulations! You have successfully completed this lesson. End of Procedure.

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.

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

Step 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.

Step 3. Information contained in the Instructional Text will vary per Agency.

Step 4. Click the **E-Sign & Certify** button.

Step 5. Click the **OK** button.

Step 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.

Step 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

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

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

Step 2. Click the **View Leave Balance/Expirations** link.

Step 3. Click the **Show next row (Alt+.)** button.

Step 4. Click the **Show next row (Alt+.)** button.

Step 5. Click the **Show next row (Alt+.)** button.

Step 6. Click the **Show next row (Alt+.)** button.

Step 7. Click the **Show next row (Alt+.)** button.

Step 8. Click the **Show previous row (Alt+,)** button.

Step 9. Click the **Show Time Expiring in** list.

Step 10. We chose the Show All option to view all of the time that will expire for the Extended Sick Leave category.

Click the **Show All** list item.

Step 11. The **Number of Hours Expiring** for the Extended Sick Leave are zero.

Click the **Show next row (Alt+.)** button.

Step 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.

Step 13. Congratulations! You have successfully completed this lesson.

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.

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

Step 2. Click the **Employee Monthly Time Report** link.

Step 3. Click the **Choose a date (Alt+5)** button.

Step 4. Click the drop down list.

Step 5. Click the **February** list item.

Step 6. Click the **28** link.

Step 7. Click the **Run report and email** button.

Step 8. Click the **OK** button.

Step 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.

Step 10. Congratulations! You have successfully completed this lesson.

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
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 1. Click the **My Profile** button.

Step 2. Click the **View My Personal Information** link.

Step 3. The top portion of the **'My Personal Information'** page displays the employee's name and address information.

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.

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.

To learn how to change an address, refer to Exercise, Scenario 4: Edit Mailing Address.

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

Step 5. Next, the **'My Personal Information'** page displays the employee's **Phone Numbers**, **Emergency Contact** information, and **Email Addresses**.

Each section contains a check mark indicating what should be considered the employee's **Preferred** or **Primary** information to be used.

Step 6. Click the scrollbar to navigate down the page.

Step 7. Next, the **'My Personal Information'** page displays the employee's **Information Release Indicator** selections and if the employee filled out the **Disability Indicator** information.

Employee AAA has opted to only release their emergency contact information to the public and not to release any disability information.

Note: Selecting a Disability Indicator is not required. This function is completely voluntary on behalf of the employee.

Step 8. Click the scrollbar to navigate down the page.

Step 9. 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.

Note: Employee confidential information has been removed from this page.

Step 10. Click the **Return to Employee Self-Service** link.

Step 11. Congratulations! You have successfully completed this lesson. **End of Procedure.**

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
2. Add an additional emergency contact

Step 1. Click the **My Profile** button.

Step 2. Click the **Edit Emergency Contacts** link.

Step 3. **Edit an existing Emergency Contact**

In this lesson you will learn how to change your existing contact information to a new emergency contact person.

(Changing Friend 1 to Dad)

Click the **Edit** button.

Step 4. Click in the **Contact Name** field.

Step 5. Press **[Delete]**.

Step 6. Enter the desired information into the **Contact Name** field. Enter "**Dad's Full Name**".

Step 7. Click the **Relationship to Employee** list.

Step 8. Click the **Parent** list item.

Step 9. Check the applicable box if the information is the same as the users. This will duplicate the information for the emergency contact.

Step 10. If the information is different it will have to be entered manually.

Click the **Edit Address** button.

Click in the **Address 1** field.

Enter the applicable information into the **Address 1** field.

In this example use 1234 One Road.

Enter "**1234 One Road**".

Step 11. Enter the applicable information into the **City** field.

In this example use Austin.

Enter "**Austin**".

Step 12. Enter the applicable information into the **State** field.

In this example use Texas. Enter "**TX**".

Step 13. Enter the applicable information into the **Postal** field.

Step 14. In this example use 78731. Enter "**78731**".

Step 15. Enter the applicable information into the **County** field.

In this example, use 227 for Travis County. Enter "**227**".

Step 16. Click the **OK** button.

Step 17. Click the scrollbar to navigate down the page.

Step 18. Click in the **Telephone** field.

Step 19. Press **[Delete]**.

Step 20. Enter the desired information into the **Telephone** field. Enter "**512/555-1111**".

Step 21. Click the scrollbar to navigate down the page.

Step 22. 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.

Step 23. The system will confirm the information was saved successfully.

Click the **OK** button.

Step 24. 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.

For future changes to this emergency contact select the edit pencil icon.

To delete this emergency contact select the garbage can.

Step 25. **Add an additional Emergency Contact**

In this lesson you will learn how to add a second emergency contact.
(Adding Mom)

Click the **Add Emergency Contact** button.

Step 26. Click in the **Contact Name** field.

Step 27. Enter the desired information into the **Contact Name** field. Enter "**Mom's Full Name**".

Step 28. Click the **Relationship to Employee** list.

Step 29. Click the **Parent** list item.

Step 30. Click the Edit Address button.

Step 31. Click in the **Address 1** field.

Step 32. Enter the applicable address information into the Address 1 field.

Enter "4321 Second Street".

Step 33. Click in the **City** field.

Enter the applicable city information into the **City** field.

Enter "**Austin**".

Step 34. Press **[Tab]**.

Step 35. Enter the applicable State information the **State** field.

Enter "**TX**" for Texas.

Step 36. Press **[Tab]**.

Step 37. Enter the applicable Zip Code information into the **Postal** field. Enter "**78742**".

Step 38. Press **[Tab]**.

Step 39. The County field does not accept County names. Use the Look up glass to determine the applicable County number.

Step 40. Click the **Look up County** button.

Step 41. Click the scrollbar to move down the page.

Step 42. Click the **227** link for Travis County.

Step 43. Click the **OK** button.

Step 44. Click the scrollbar to navigate down the page.

Step 45. 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.

Step 46. Click the **Save** button.

Step 47. The system will confirm the information was saved successfully.
Click the **OK** button.

Step 48. Congratulations! You have successfully completed 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.

Step 1. Click the **My Profile** button.

Step 2. Click the **Edit Phone Numbers** link.

Step 3. You will designate a Preferred Contact Number.

CAPPS only allows one contact number as the designated preferred number, or the number where you prefer to be reached.

It is designated by a check box under the Preferred option.

In this example, you will change the preferred designation from the Home phone number to the Business Cell phone number.

Click the **Preferred** option for Business Cell.

Step 4. The Business Cell number is now the designated phone number to be used.

Step 5. Now, you will delete an Old Phone Number.

Step 6. 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.

Click the **Delete** button to remove the old phone number.

Step 7. 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.

Step 8. To add the new phone number, click the **Add Phone Number** button.

Step 9. Click the **Phone Type** list.

Step 10. Click the **Home** list item.

Step 11. Click in the **Telephone** field.

Step 12. Enter the new phone number into the **Telephone** field.

Enter "**512/555-5444**".

Step 13. To change your preferred phone number back to your home phone, click the **Preferred** option box.

Step 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.

Step 15. Click the **Save** button.

Step 16. The system will confirm the information was saved successfully.

Click the **OK** button.

Step 17. Now, you will add a fax number.

Step 18. Click the **Add Phone Number** button.

Step 19. Click the **Phone Type** list.

Step 20. Click the **FAX** list item.

Step 21. Click in the **Telephone** field.

Step 22. Enter the fax number into the **Telephone** field.

Enter "**512/555-4455**".

Step 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.

Step 24. The system will confirm the information was saved successfully.

Click the **OK** button.

Step 25. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Edit Mailing Addresses

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

Procedure

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 1. Click the **My Profile** button.

Step 2. Click the **Edit Mailing Address** link.

Step 3. Click the **Edit** pencil icon.

Step 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.

Step 5. Click the dropdown arrow to select the month **April.**

Step 6. Click **April** from the list.

Step 7. Click the number **'1'** for the date.

Note: you can pick any day of the year.

Step 8. Click in the **Address 1** field.

Step 9. Press **[Delete]**.

Step 10. Enter the new address information into the **Address 1** field.

Enter "**6001 Baseline Drive SW**".

Step 11. **Note:** Since the City and State did not change, you can skip over the fields.

Click in the **Postal** field.

Step 12. Press **[Backspace]**.

Step 13. Enter the new Zip Code into the **Postal** field.

Enter "**78731**".

Step 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.

Step 15. The system will confirm the information was saved successfully.

Click the **OK** button.

Step 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".

Step 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 1.	Click the **My Profile** button.
Step 2.	Click the **Request Name Change** link.
Step 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 4.	Click the **Edit Name** button.
Step 5.	Click in the **Last Name** field.
Step 6.	Enter the new **Last Name**. In this example, enter "**BBB**".
Step 7.	Click the **Refresh Name** button to update the information.
Step 8.	Notice how the update information is now reflected on the page.
Step 9.	Click the **OK** button to accept the change.
Step 10.	Please be sure to provide the required information to your Human Resources representative.
Step 11.	Click the **Submit** button. After clicking the **Submit** button, this information is then forwarded to your manager for approval.
Step 12.	Click the **OK** button to continue.
Step 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.

Step 1. Click the **My Profile** button.

Step 2. Click the **Information Release Indicator** link.

Step 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.

Step 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.

Step 5. Click the 'Release All Information' box to authorize release of all the information listed below.

Note: It is not recommended by CAPPS that you release personal confidential information. (e.g. Social Security Number)

Click the **Release All Information** option.

Step 6. Click the **Release No Information** check box.

Step 7. Notice how all the values below changed to an **'N'** for No Release.

Step 8. 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.

In this example, click the **Emergency Contact Information** dropdown arrow to change the value to a 'Y' indicating a Yes to release the information.

Step 9. Click the '**Y**' list item.

Step 10. 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.

Step 11. The system will confirm the information was saved successfully.

Click the **OK** button.

Step 12. 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 1. Click the **My Profile** button.

Step 2. Click the **Maintain Disability Status** link.

Step 3. When filling out this page, be sure to first read the ADA disability definition.

Step 4. In this example, click the **'No'** check box.

Step 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.

Step 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 1. Click the **My Profile** button.

Step 2. Click the **BRP Leveling/Non-Leveling** link.

Step 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.

Step 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.

Step 5. The system will confirm the information was saved successfully.

Step 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.

Step 1. First, we will view your earnings statement.

Step 2. Click the **My Pay** button.

Step 3. Click the **View/Print Earnings Statement** link.

Step 4. **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.

Step 5. In this instance there is only one Earnings Statement available to view.

The system is displaying one record, and there is only one record for this employee.

Step 6. Click the date of the Earnings Statement that you want to view.

Step 7. In this example, click the **01/21/2015** link.

Step 8. The Earnings Statement for the date you selected will automatically appear.

The top portion of the Earnings Statement contains **General** and **Tax Withholding** information.

Click the scroll bar to navigate down the page.

Step 9. The middle portion of the Earnings Statement contains your **Paycheck Summary, Earnings,** and **Tax** withholding information.

Click the scroll bar to navigate down the page.

Step 10. The bottom portion of the Earnings Statement contains **Before** and **After Tax Deduction**, and **Employer Paid Benefits.**

The **Net Pay Distribution** box contains banking information.

Click the scroll bar to navigate to the top of the page.

Step 11. Now, we will print an earnings statement.

Begin by right-clicking in any open space with your mouse.

Note: You can also use the print icon at the top of the page.

Step 12. Click the **Print...** option from the menu.

Step 13. Select the applicable printer at the top of the pop-up window.

Step 14. Click the **Print** button.

Step 15. Congratulations! You have successfully completed this lesson.
End of Procedure.

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 1. Click the **My Pay** button.

Step 2. Click the **View Compensation History** link.

Step 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 4. Click the **Choose a date** button.

Step 5. Click the drop down arrow to change the month.

Step 6. Click the month of **March**.

Step 7. Click the drop down arrow to select the year.

Step 8. Click the year **2015**.

Step 9. Click the last day of the month.
Note: you can select any applicable date.

Step 10. Click the **Refresh Data** button.

This will retrieve any new information for the dates you selected.

Step 11. 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.

Step 12. Congratulations! You have successfully completed this lesson.
End of Procedure.

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.

Step 1. Click the **My Pay** button.

Step 2. Click the **View/Edit Direct Deposit** link.

Step 3. The current **Direct Deposit** information is displayed.

It is important to note that in CAPPS there can only be one account set up for direct deposit.

Step 4. To view **Direct Deposit** details, click the **Savings** link.

Step 5. The **Direct Deposit Detail** page automatically displays. This page contains banking detail information.

Click the **Return to Direct Deposit** link.

Step 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.

Step 7. If you know the **Routing Number** you can type it directly in the box.

If you do not know the **Routing Number**, you can use the **Look Up Glass** to locate your bank's Routing Number.

Employee AAA is changing the type of account at the same bank, therefore the routing number will not change.

Step 8. Click in the **Account Number** field.

Step 9. Enter the new **Bank Account Number** into the **Account Number** field.

Employee AAA Bank checking account number is 111222333.

Enter "**111222333**".

Step 10. Click on the drop down arrow to select **'Checking'**.

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

Step 12. To accept the change, click the **Submit** button.

Step 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

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

Step 1. Click the **My Pay** button.

Step 2. Click the **Voluntary Deductions** link.

Step 3. Notice how Employee AAA has an existing voluntary deduction to Abilene Teachers FCU.

Step 4. 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 5. Click the **Add Deduction** button.

Step 6.	Click the **Look up *Type of Deduction** button.
Step 7.	Click the scrollbar to navigate down the selection list.
Step 8.	Click the **United Heritage Credit Union** link.
Step 9.	Click in the **Enter Amount to be deducted** field.
Step 10.	Enter the amount to be deducted into the **Enter Amount to be deducted** field.
Step 11.	In this example enter "**150.00**".
Step 12.	**Option 1** - **Goal Amount** is used to set the total amount to be deducted. **Option 2** - **Deduction Stop Date** is used when you want your deductions to stop on a specific date. Select either Option 1 or Option 2 when entering your Voluntary Deduction.
Step 13.	**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.**
Step 14.	**Note:** This lesson is how to add a voluntary deduction with a specific stop date. Click in the **Option 2: Enter Deduction Stop Date** field.
Step 15.	Enter the date you want the deduction to stop in the **Option 2: Enter Deduction Stop Date** field. In this example, enter "**12/01/2015**".
Step 16.	Click the **Submit** button.
Step 17.	Click the **OK** button.
Step 18.	**Note:** Should you need to change an existing voluntary deduction use the **Edit** button.
Step 19.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

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 1.	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**.
Step 2.	You are also able to select the **My Pay** button to the left if you choose to use to navigate instead.
Step 3.	Click the **My Pay** button.
Step 4.	Click the **Charity Deductions** link.
Step 5.	**Note:** Charitable Deductions are taken **once a year**.
Step 6.	A maximum of **three, (3)** deductions may be selected.
Step 7.	You will be directed to a (**State Employee Charitable Campaign**) site that interfaces with **CAPPS.**
Step 8.	Click the **https://www.secctexasgiving.org/** link.
Step 9.	This screen lists the **Campaign Areas.** The names are in alphabetical order.
Step 10.	You will select the **Campaign Area** of your choice and will be taken to the **Register** and/or **Login** page.
Step 11.	Click the **CAPITAL AREA SECC** link.
Step 12.	If this is your first time Making a Pledge, you will select the **Register** button. If not, select the **Login** button.
Step 13.	**You will then continue through the Campaign site following the detailed instructions. Those details are not captured in this training.**
Step 14.	Click the **REGISTER** button.
Step 15.	***After the enrollment period is over,*** you have the option to edit or delete an existing Charitable Deduction.
Step 16.	The next steps will show you how to edit and delete your deduction.

Step 17. Click the **My Pay** button.

Step 18. Click the **Charity Deductions** link.

Step 19. After the election period has closed, you can edit or delete your elections throughout the year.

Step 20. Please review the second paragraph in regards to being a new hire, rehire or transfer.

Step 21. To change the amount of your election,

Step 22. Click the **Edit** button.

Step 23. The Charitable campaign election(s) will be listed. Edit the monthly amount being deducted.

Step 24. Don't forget to Save your changes!

Step 25. In this exercise, we won't be Saving but will move on to Deleting a deduction.

Step 26. To delete a Charitable election,

Click the **Delete** button.

Step 27. Review and respond to the message accordingly.

Step 28. This is an opportunity for you to confirm the Delete. You will not be able to re-add after this point.

Step 29. In this exercise, you will select Cancel.

Step 30. Click the **Cancel** button.

Step 31. Congratulations! You have successfully completed this lesson.
End of Procedure.

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.

Step 1. Click the **My Pay** button.

Step 2. Click the **W-4 Tax Information** link.

Step 3. Before entering your W-4 tax information you should always validate that your name, social security number, and address information is correct.

If your social security number is incorrect, contact your Human Resources office.

If your address is incorrect, 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.

Step 4. Click in the field and enter the total number of Allowances **you are claiming** in the field.

In this example: Enter "**1**".

Step 5. Click in the field and enter the additional amount, if any, **you want withheld from each paycheck** in the field.

In this example: enter "**50.00**".

Note: This field is optional.

Step 6. The radio buttons here allow you to select either **Single** or **Married** status.

In this example **Single** is being used.

Step 7. 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.

In this example, select the box.

Step 8. Click the scrollbar.

Step 9. For exempt status, read the conditions listed and check the box if applicable

Step 10. When you have completed filling out the W-4 tax data, click the **Submit** button.

Step 11. You will be asked to enter your password in the **Password** field.

This should be your own unique password. Use the same password that you used to sign-in.

In this example: enter "**P@$$w0rd**".

Step 12. Click the **Continue** button.

Step 13. Congratulations! You have successfully completed this lesson.
End of Procedure.

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:

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

Step 1. Click the **My Pay** button.

Step 2. First, we will print a copy of your W-2.

Click the **View W-2/W-2c Forms** link.

Step 3. Click the **Year End Form** link.

Step 4. Your W-2 Form will appear.

Note: For security purposes confidential information has been removed.

Step 5. Click the **Print** button.

Step 6. Now, you will view filing instructions.

Click the **Filing Instructions** link.

Step 7. The Filing Instructions document will appear.

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

Step 9. Check to make sure you are printing to the applicable printer, and then click the **Print** icon to continue.

Step 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 1. Click the **My Pay** button.

Step 2. Click the **W-2/W-2c Consent** link.

Step 3. Click the scrollbar to view all the content within the description box.

Step 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.

Step 5. Click the **Submit** button.

Step 6. Click in the **Password** field.

Step 7. Enter your password (the same password that you logged in with) into the **Password** field.

In this example enter "**P@$$w0rd**".

Step 8. Click the **Continue** button.

Step 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.