CAPPs HR/Payroll
End-User Training (EUT)

Manager Self Service Course: 110 & 111
Course Name: Manager Self Service Lite & Manager Self Service
This course is recommended for all managers

It is recommended that managers take 99-CAPPs Fundamentals and 100-Employee Self Service prior to taking this course.

Introductions

If you are taking this course in a group, or in a classroom setting, take a moment to get to know one another.

- Share
- Your Name
- Your department or agency function
- Your expectations from this session
- An interesting fact about yourself

Greetings

Before we get started, let's go over some pointers and tips that will help you complete this course.

Course Preparations

Pointers and tips to remember while taking this course:

- This course will take approximately 3 1/2 hours. This course may be completed in sections, or all in one session.
- Make sure you view all the information using the Next and Back navigation buttons.
- Close all other applications including email while taking the course.
• Move your mouse over this symbol to view content “Fun Facts”.

Begin Part I

Course Division

This course has been designed for agencies who elected Manager Self Service (Lite) or Manager Self Service (Full).

Manager Self Service (Lite) #111
Complete Part I only (Sections 1 & 2)

Manager Self Service (Full) #110
Complete Parts I & II (Sections 1 - 8)

Getting Started

Now that you are ready to begin, let’s review the Course Objectives and Course Outline for Part I, Sections 1 & 2.

Course Objectives - Part I

After completing Part I of this course you will be able to:

• Manage time related activities using Manager Self Service functionality.
• Run time and leave reports

Course Outline - Part I

PART I - Manager Self Service (MSS) Lite & Full

Section 1: Time and Leave Management
Section 2: Reporting

There is a knowledge check activity that completes Part I.
Now that you are familiar with the course structure for Part I, let’s move on to Section 1.
Section 1
Time and Leave Management

Section 1 - Objectives

At the end of this section you will:

- Understand key terms and definitions
- Understand Time Administration roles and responsibilities
- Understand CAPPS module touch points
- Understand the Time Administration process and workflow
- Understand and perform various time management activities on behalf of direct reports

Section 1 - Key Terms & Definitions

- Manager Self-Service - Manager Self-Service is a collaborative application which enables managers to view, maintain, and perform routine tasks necessary to manage their direct reports.
- Separation Effective Date - One day after the last date the employee is paid through, or in the case of death, one day after the date of death. The date of death is the last date through which the employee is paid.
- Last Date Physically Worked - Last date the employee was physically on the job. This is independent from the Separation Effective Date entered.
- Employee Separation - Involuntary separation occurs when the department may choose to separate its employees through reduction in force or termination.
- Employee Separation - Voluntary - Voluntary separation is the separation filed by the employee when the employee willingly initiates termination of service with the department.
- Payable Time - Payable time goes through many stages, most of which relate to the transmission of payable time records from Time and Labor to your payroll system, as well as the transmission of cost data from your payroll system to Time and Labor. Payable status records the progress of payable time through these stages.
- Reports To - To establish reporting relationships, select the position number that an employee reports to from the list of available options. The Reports To field is used to generate organizational reports in Position Management.
Job Code - Jobs are identified by unique job codes. Job codes are different from positions: Within a single job code, you can have a number of positions. For example, you can have a job code representing Administrative Assistant, and within that job code. You can have different Administrative Assistant positions - one in your Accounting department, one in Research, and one in your Compensation group. Job Codes in CAPPS are the Class Codes set by SAO.

Business Unit - The Business Unit is a business level between company and departments that identify divisions for reporting and operations. Business Unit values may include the agency number suffixed with two additional characters. (ex. 30400)

Company - The Company Code in CAPPS is the Agency number.

Departments - Departments within CAPPS continue to identify operational entities within an agency. Multiple departments can be organized by Business Units and are key to system security as well as position and job information.

Section 1 - Roles & Responsibilities

Employee - This role is responsible for making sure that all the hours reflected on their Timesheet are accurate. This includes physical hours worked and leave time taken for Positive Time Reporters and Exception Time Reporters.

Manager - This role is responsible for monitoring, reviewing, and approving time worked or leave time taken entered on the employee Timesheet. Managers can also enter time on behalf of an employee. They also initiate separations, change employee work data and process merit increases.

Time Administrator - This role performs the duties of the manager on behalf of the manager.

Agency Super User - This role provides oversight to the other roles and can monitor, review, approve and enter time on behalf of an employee. This role also has the authority to correct exceptions that occur from Time Admin processing, and can run reports and queries at an agency level.

CAPPS HR/Payroll Modules Integration

CAPPS HR/Payroll is comprised of several integrated applications known as modules. These modules are used to manage employee, human resource, time and labor, and payroll functions.
The central module in this integration is Human Resources. The Human Resources module contains key personal and job-related information that is shared by the other modules within CAPPS. The additional core modules include Position Management, Time and Labor, Payroll and Base Benefits. Performance Management, Recruit, and Learn are optional non-core modules.

The module integration uses data stored to accurately assign and change positions, change salary, create timesheets, update benefits, pay employees, and perform performance reviews.

Section 1 - Time Management Outline

1) Manager Timesheet
2) Time Administration
3) Schedules
4) Approvals

Manager Timesheet Entry

- Managers can make Timesheet entries on behalf of the employee including entering hours worked and leave taken.
- Managers can also certify an employee’s time on the View/Edit Time Certification page.

Section 1, Lesson 1 Exercise

Exercise:

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

Manager Timesheet Entry

Lesson 1: Manager Timesheet Entry and Certification
Lesson 2: Viewing Employee Leave Balances
Lesson 3: Entering Leave without Pay
Section 1, Lesson 1 exercise scenarios (opens a new web browser).

After completing the exercise, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Section 1, Lesson 2

Time Administration

The time administration batch process in Time and Labor generates payable time. It is generated using the Time and Labor online tools for rule creation and selects the appropriate time reporters for processing, combines time reporters into batches for efficient processing, determines the period to process, and calculates prior period adjustments. Time Administration is a nightly batch process.

Time Administration Workflow Diagram
Timesheet Workflow Details

Time Reporting Process

Employee (Reported Time)

Exception Time Reporter - Enters only hours that deviate from their regular scheduled hours

Positive Time Reporter - Enters all hours physically worked and leave taken

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

Manager

Approve

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

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

OR

Deny

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

When the Time Administration Process runs, it produces one to two outcomes:
1. It converts Reported Time to Payable Time, making it ready for payroll, or
2. If there is an error on the Timesheet, it will create an Exception on the Timesheet.
Payable Time

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

Exceptions

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

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

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

This employee has an Exception

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

Section 1, Time Management Lesson 3

Schedules

- Understanding how scheduled hours appear on the Timesheet in CAPPS.
- The standard schedule is Monday through Friday, working the same amount of hours each day. All other schedules are considered non-standard.
- Managers access schedules through the View/Edit Time and Leave Setup pages to change a schedule. To override the schedule during a FLSA workweek, access the Override Scheduled Workday page.

Section 1, Lesson 3 Exercise

Exercise:

The following exercise provides step-by-step instructions to perform the following tasks in CAPPS:
Schedules
Lesson 3: Assigning/Overriding Employee Schedules

View Section 1, Lesson 3 (opens a new web browser).

After completing the exercise, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Section 1, Time Management Lesson 4

Approvals

Hours entered directly on the timesheet by a manager are approved when the manager clicks E-Sign & Approve. Hours entered by an employee require approval from the manager, which can either be done on the timesheet or on the Manager Summary Approval page. If a manager denies the hours, the employee must re-enter them so they can be rerouted back to the manager for review/approval.

Section 1, Lesson 4 Exercise

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

Exercise:

Approvals

Lesson 4: Viewing and Approving Employee Time

View Section 1, Lesson 4 exercise scenarios (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.
Section 2 - Reporting

Section 2 - Objectives

Learn how to run and view reports that are helpful to managers, including the following reports:

- Employee Monthly Time and Leave
- TRCs by Date Report

Section 2, Lesson 1 Exercise

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

Manager’s Reports
Lesson 1: Reporting

View Section 2, Lesson 1 exercise scenarios (opens a new web browser).

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

Part I - Summary

Summary

Congratulations, you have completed this course. Today you learned the following Manager Self Service features:

- How to manage time related activities using the Manager Self Service menus
- How to run time and leave reports

Part I-End
Conclusion MSS-Lite (111)

This completes the Manager Self Service Lite (Course 111)

Now that you have completed Part I, it’s now time to move on to Part II of the Manager Self Service (110) training course.

**NOTE:** Agencies deploying Manager Self Service Lite (Course 111) do **NOT** need to complete Part II of this course.

**Getting Started**

Now that you are ready to begin, let’s review the Course Objectives and Course Outline for **Part II, Sections 3 thru 8.**

**Course Objectives - Part II**

After completing Part II of this course, you will be able to:

- View Employee Personal Data
- Maintain Employee Work Information
- Award Merit increases
- Leave of Absence
- Separations and Terminations
- Designate Workflow Alternate

**Course Outline - Part II**

**PART II - Manager Self Service (Completion of MSS Full)**

**Section 3:** View Employee’s Personal Information

**Section 4:** Maintain Employee’s Work Information

**Section 5:** Compensation Management

**Section 6:** Separations

**Section 7:** Designate Workflow Alternate
Now that you are familiar with the course structure for Part II, let’s move on to Section 3.

Section 3

View Employee’s Personal Data

Section 3 - Objectives

Managers will be able to view personal data for their direct reports in the following areas:

- Position
- Start Date
- Job Code
- Company
- Business Unit
- Department
- Location Code
- Employee ID (Empl ID)

Section 3, Lesson 1 Exercise

Exercise:

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

View Employee Personal Data

Lesson 1: View Employee Personal Data

View Section 3, Lesson 1 exercise scenarios (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.
Section 4

Maintain Employee’s Work Information

Section 4 - Objectives

Learn how to change and review your employee’s work information in the following areas:

- Change an employee’s work location
- Change an employee’s ‘Reports To’ manager when there is a change in reporting structure.
- Review and update agency property for an employee

Section 4, Lesson 1 Exercise

Exercise

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

Maintain Employee’s Work Information

Lesson 1: Maintain Employee’s Work Information

View Section 4, Lesson 1 exercise scenarios (opens a new web browser).

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

Section 5

Compensation Management

Section 5 - Objectives
Learn how to use CAPPS Manager Self Service (MSS) functionality in the following areas:

- Award Merit Increase
- Leave of Absence
- Employee Compensation

Section 5, Lesson Outline

1) Award Merits
2) Leave of Absence
3) Employee Compensation

Section 5, Lesson 1

Award Merit Increases

- The manager processes a one-time or regular merit award increase for one of his direct reports and sends it for approval.
- After it is approved, the manager can check the status of the request on the One-Time or Regular Merit Status page.

Section 5, Lesson 1 Exercises

Exercise

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

Award Merit Increase

Lesson 1: Awarding One-Time Merit
Lesson 2: Awarding Regular Merit

View Section 5, Lesson 1 exercise scenarios (opens a new web browser).

After completing the exercise, close the browser tab and return to the course.
Section 5, Lesson 2

Leave of Absence

- Request Leave of Absence
- Return From Leave of Absence

Section 5, Lesson 2 Exercise

Exercise

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

Leave of Absence
Lesson 2: Leave of Absence

View Section 5, Lesson 2 exercise scenarios (opens a new web browser).

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

Section 5, Lesson 3

Employee Compensation

The Total Compensation page displays historical base salary and Benefit Replacement Pay (BRP), provided the data is available in CAPPS. Historical data for other types of pay listed are available only for periods on and after the implementation of CAPPS, such as longevity and shift differential.

The Compensation History page displays salary history by change date.
Section 5, Lesson 3 Exercise

Exercise

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

View Employee Compensation
Lesson 3: View Employee Compensation

View Section 5, Lesson 3 exercise scenarios (opens a new web browser).

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

Section 6

Separations and Retirement

Section 6 - Objectives

Learn how to process separations in the following areas:

- Voluntary Separations
- Involuntary Separations
- Separation Due to Death
- Employee Retirement

Section 6, Lesson Outline
1) Voluntary Separation
2) Involuntary Separation
3) Separation Due to Death
4) Employee Retirement
Section 6, Lesson 1

Voluntary Separation

- Voluntary separation is the separation filed by the employee when the employee willingly initiates termination.
- The manager enters the required data onto the Voluntary Separation page and reviews and completes the request via MSS.

Section 6, Lesson 2

Involuntary Separation

- Involuntary separation occurs when the department may choose to separate its employees through reduction in force or termination for conduct reasons.

Section 6, Lesson 3

Separation Due to Death

CAPPS will automatically process any payments due to the estate properly once the termination code for an employee death has been entered.

Section 6, Lesson 4

Employee Retirement

- The manager receives a retirement request from an employee, and the manager notifies Human Resources (HR) regarding the request.
- The manager reviews and completes the retirement request via Manager Self Service.
Section 6, Lesson 4 Exercises

Exercises

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

Separations
Lesson 1: Voluntary Separation
Lesson 2: Involuntary Separation
Lesson 3: Separation Due to Death
Lesson 4: Employee Retirement

View Section 6, Lesson 4 exercise scenarios (opens a new web browser).

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

Section 7

Designate Workflow Alternate

Section 7, Lesson 1 Exercise

Exercise

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

Designate Workflow Alternate

Lesson 1: Designate Workflow Alternate

View Section 7, Lesson 1 exercise scenarios (opens a new web browser).

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

Section 8
Summary

Congratulations, you have completed this course. You learned about the following Manager Self Service features:

- Manage time related activities
- Run time and leave reports
- View Employee Personal Data
- Maintain Employee Work Information
- Award Merit
- Leave of Absence
- Separations and Terminations
- Designate Workflow Alternate

Conclusion

This completes the Manager Self Service Course 110.