

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

CAPPS HR/PAYROLL
End-User Training (EUT)

EUT Course - 110
Manager Self Service

PeopleSoft 9.2
July 2016

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Manager Self Service

Manager Self Service

Section 1 - Time and Leave Management

Section 1 - Time and Leave Management

Manager Timesheet Entry

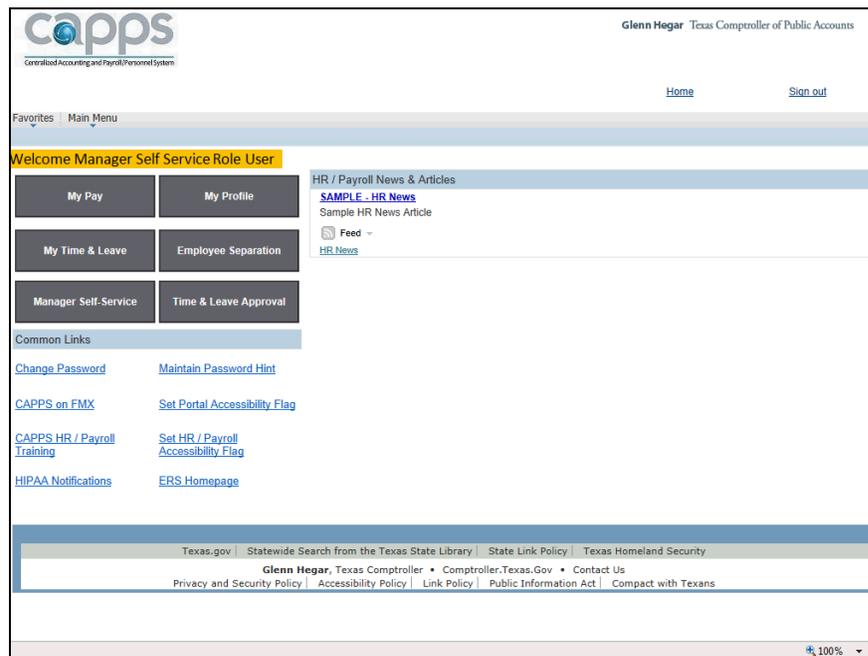
Section 1 - Lesson 1 Exercises - Manager Timesheet Entry

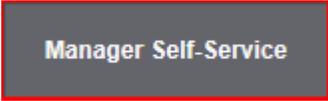
Procedure

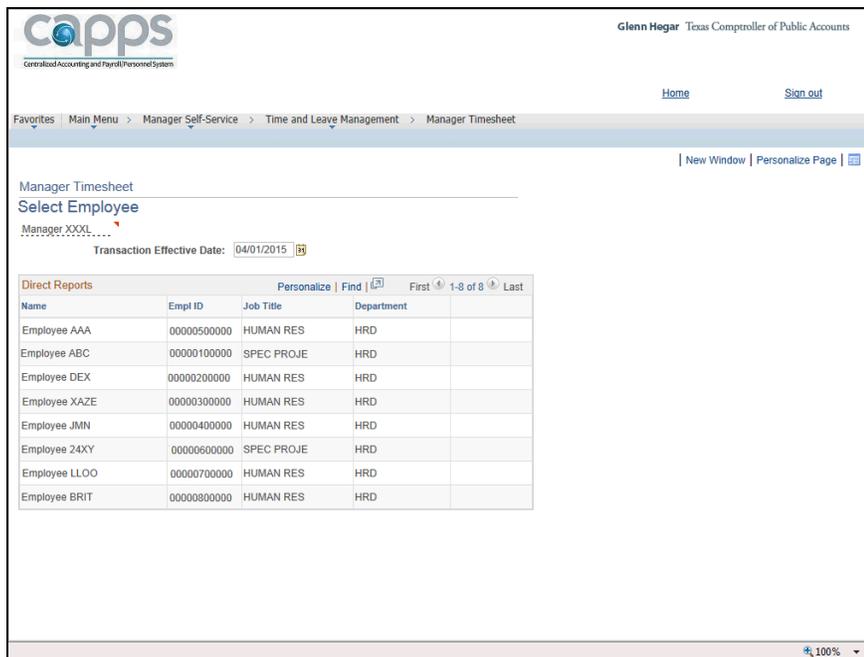
In this lesson you will learn how to enter time on behalf of your direct report. You will learn how to do the following:

1. Enter Annual Leave
2. Enter Sick Leave Taken
3. Enter Time Worked on a Holiday with a Labor Account Code
4. Certify Time on Behalf of Direct Report

The timesheet lookup page will default to the first of the current month; all months will display 31 days regardless of the number of days in the month.



Step	Action
1.	Navigate to the Manager Timesheet . Click the Manager Self-Service button. 
2.	Click the Time and Leave Management link. 
3.	Click the Manager Timesheet link. 



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Home Sign out

Favorites Main Menu > Manager Self-Service > Time and Leave Management > Manager Timesheet

Manager Timesheet

Select Employee

Manager: XXXL

Transaction Effective Date: 04/01/2015

Name	Empl ID	Job Title	Department
Employee AAA	00000500000	HUMAN RES	HRD
Employee ABC	00000100000	SPEC PROJE	HRD
Employee DEX	00000200000	HUMAN RES	HRD
Employee XAZE	00000300000	HUMAN RES	HRD
Employee JMN	00000400000	HUMAN RES	HRD
Employee 24XY	00000600000	SPEC PROJE	HRD
Employee LLOO	00000700000	HUMAN RES	HRD
Employee BRIT	00000800000	HUMAN RES	HRD

Step	Action
4.	Choose the Direct Report needing hours entered on the timesheet. Click the Employee DEX link. 

Step	Action
5.	<p>Note: If there is an exception on a timesheet (an exception is an error occurring when time is processed), the system displays a moving banner across the top of the screen: "You have an exception." Both the employee and the manager will be locked out of the timesheet until the exception is resolved.</p> <p>Your agency Super User will check daily for exceptions, and will research the errors to clear them as quickly as possible, so that timesheet access can be restored.</p>
6.	<p>1. Your employee is taking Annual Leave.</p> <p>Click the Look up Time Reporting Code (Alt+5) button.</p> 
7.	<p>Find the Time Reporting Code for Annual Leave Taken (ANLVT).</p> <p>Click the ANLVT link.</p> 
8.	<p>The CAPPS HR/Payroll system uses decimals, and not minutes, for time reporting.</p> <p>15 minutes = .25 hours 30 minutes = .50 hours 45 minutes = .75 hours</p> <p>For example, if you work 7 1/2 hours, you would enter 7.50 hours on your timesheet, and not 7:30 (as in the old system).</p>
9.	<p>In this exercise, Employee DEX took 8 hours of Annual Leave on Thursday, April 2.</p> <p>Enter the desired information into the Thu 4/2 0.00 field. Enter "8.00".</p> 
10.	<p>If multiple Time Reporting Codes are required, each must be entered on a separate line.</p> <p>Click the Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015 button.</p> 
11.	<p>2. Your employee is also taking 4 hours of Sick Leave.</p> <p>Click the Look up Time Reporting Code (Alt+5) button.</p> 
12.	<p>Click the Vertical Scrollbar and scroll down this list to find the Time Reporting Code for Sick Leave Taken.</p>

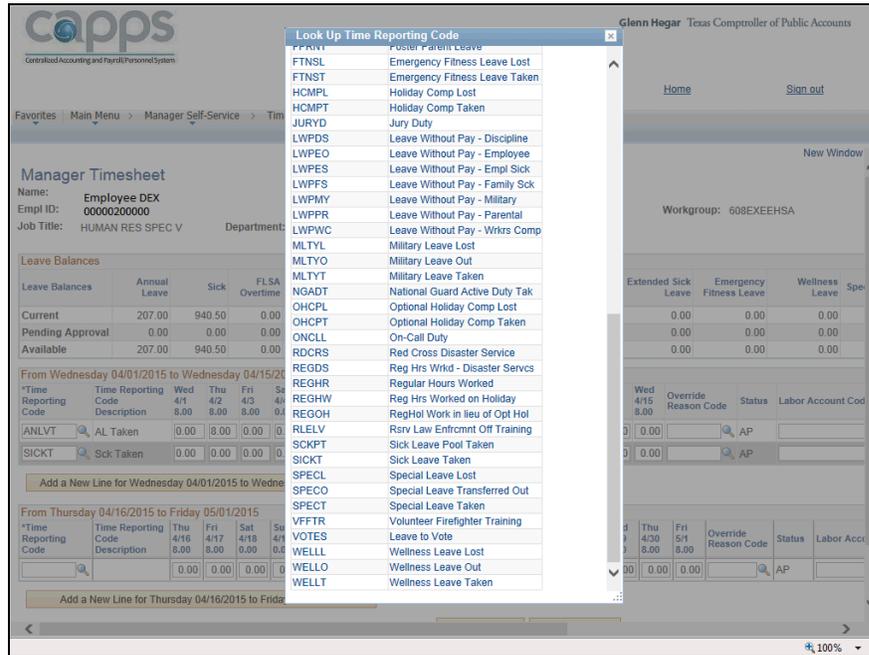
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Step	Action
13.	Click the SICKT link. 
14.	The employee is taking 4 hours of Sick Leave on April 7. Enter the desired information into the Tue 4/7 0.00 field. Enter " 4.00 ". 
15.	3. Your employee worked 8 hours on April 21. He is working on a special project being tracked, so the hours need to be charged to a Labor Account Code . And because April 21 is a holiday, and the employee is scheduled to work, you will need to use the *Time Reporting Code for working on a holiday for which the employee is scheduled to work, REGHW. Click the Look up Time Reporting Code (Alt+5) button. 

Step	Action
16.	Click the Vertical Scrollbar to scroll down the list to find the Time Reporting Code for regular time worked on a holiday.



The screenshot shows the CAPPS Manager Timesheet interface. A dropdown menu titled "Look Up Time Reporting Code" is open, listing various leave codes such as FTNSL (Emergency Fitness Leave Lost), FTNST (Emergency Fitness Leave Taken), and others. The main interface displays employee information for "Employee DEX" (Empl ID: 0000020000) and a "Leave Balances" table. The table shows current, pending approval, and available balances for Annual Leave, Sick, and FLSA Overtime. Below this, there are sections for time reporting by date range (Wednesday 04/01/2015 to Wednesday 04/15/2015 and Thursday 04/16/2015 to Friday 05/01/2015), with columns for Time Reporting Code, Description, and hours for each day.

Step	Action
17.	Click the REGHW link. REGHW
18.	Enter "8.00" into the Tue 4/21 0.00 field. <input type="text" value="0.00"/>


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[Favorites](#) [Main Menu](#) > [Manager Self-Service](#) > [Time and Leave Management](#) > [Manager Timesheet](#)

New Window

Manager Timesheet

Name: Employee DEX State Service Effective Date: 07/11/1991
 Empl ID: 00000200000 0 Position Number: 00001132 Workgroup: 608EXEEHSA
 Job Title: HUMAN RES SPEC V Department: 240001 Manager ID: 000000009 Manager XXXL

Leave Balances	Annual Leave	Sick	FLSA Overtime	Regular Comptime	Holiday Comptime	Optional Holiday	Sick Leave Pool	Administrative Leave	Extended Sick Leave	Emergency Fitness Leave	Wellness Leave	Spe
Current	207.00	940.50	0.00	0.00	16.00	0.00	0.00	32.00	0.00	0.00	0.00	0.00
Pending Approval	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Available	207.00	940.50	0.00	0.00	16.00	0.00	0.00	32.00	0.00	0.00	0.00	0.00

From Wednesday 04/01/2015 to Wednesday 04/15/2015

*Time Reporting Code	Time Reporting Description	Wed 4/1	Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9	Fri 4/10	Sat 4/11	Sun 4/12	Mon 4/13	Tue 4/14	Wed 4/15	Override Reason Code	Status	Labor Account Code
ANLVT	AL Taken	0.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			AP
SICKT	Sick Taken	0.00	0.00	0.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			AP

Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015

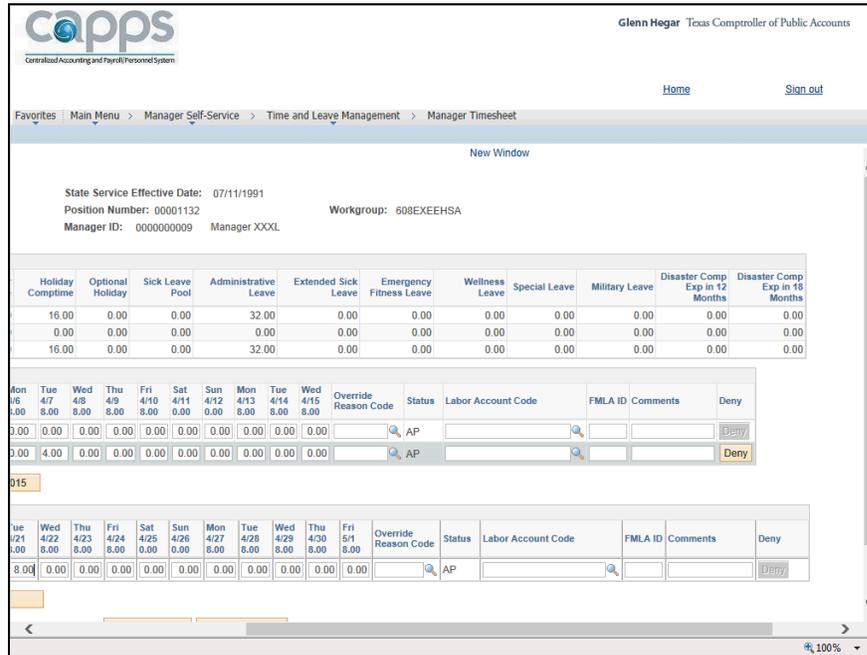
From Thursday 04/16/2015 to Friday 05/01/2015

*Time Reporting Code	Time Reporting Description	Thu 4/16	Fri 4/17	Sat 4/18	Sun 4/19	Mon 4/20	Tue 4/21	Wed 4/22	Thu 4/23	Fri 4/24	Sat 4/25	Sun 4/26	Mon 4/27	Tue 4/28	Wed 4/29	Thu 4/30	Fri 5/1	Override Reason Code	Status	Labor Account Code
REGHW	REGHR Hol	0.00	0.00	0.00	0.00	0.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			AP

Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015

100%

Step	Action
19.	To find the Labor Account Code field, click on the Horizontal Scrollbar to move to the right on this screen. 
20.	The Labor Account Code is used for allocating hours for special purposes.



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Home Sign out

Favorites Main Menu > Manager Self-Service > Time and Leave Management > Manager Timesheet

New Window

State Service Effective Date: 07/11/1991
 Position Number: 00001132
 Manager ID: 000000009 Manager XXXL

Workgroup: 608EXEEHSA

Holiday Comptime	Optional Holiday	Sick Leave Pool	Administrative Leave	Extended Sick Leave	Emergency Fitness Leave	Wellness Leave	Special Leave	Military Leave	Disaster Comp Exp in 12 Months	Disaster Comp Exp in 18 Months
16.00	0.00	0.00	32.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
16.00	0.00	0.00	32.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Override Reason Code	Status	Labor Account Code	FMLA ID	Comments	Deny
4/16	4/17	4/18	4/19	4/20	4/21	4/22	4/23	4/24	4/25						
8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00		AP				Deny
8.00	4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		AP				Deny

015

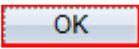
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Override Reason Code	Status	Labor Account Code	FMLA ID	Comments	Deny
4/21	4/22	4/23	4/24	4/25	4/26	4/27	4/28	4/29	4/30	5/1							
8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00		AP					Deny

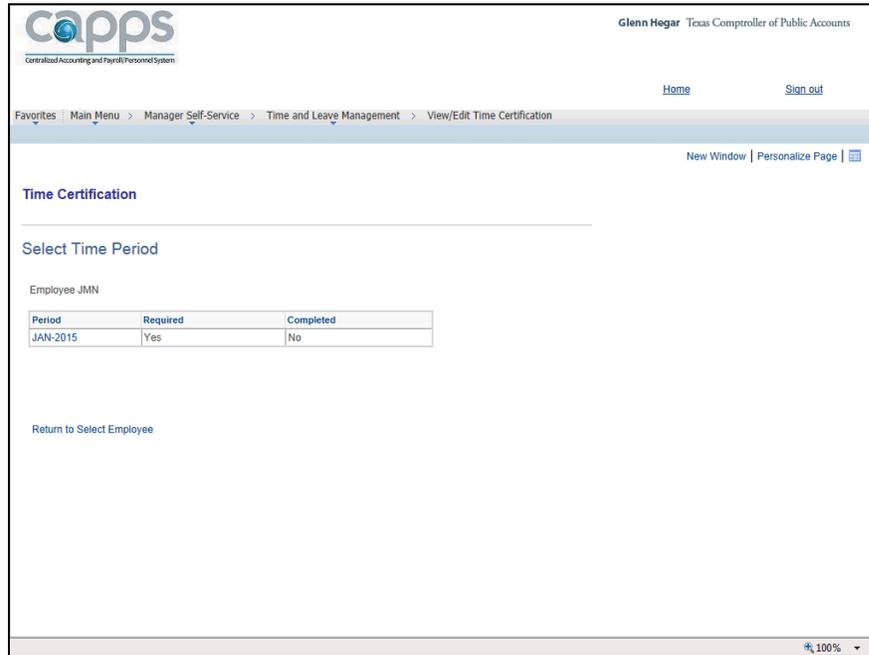
Step	Action
21.	Find the Labor Account Code that is set up to track the employee's special project. Click the Look up Labor Account Code (Alt+5) button. 
22.	Choose the appropriate Labor Account Code for the activity. For this exercise, use 608_ABT_OPERAT . Click the 608_ABT_OPERAT link. 608_ABT_OPERAT
23.	Click the Horizontal Scrollbar to scroll back to the left on this screen.
24.	When all appropriate hours have been entered for this employee, sign and approve the hours. Click the E-Sign & Approve button. E-Sign & Approve

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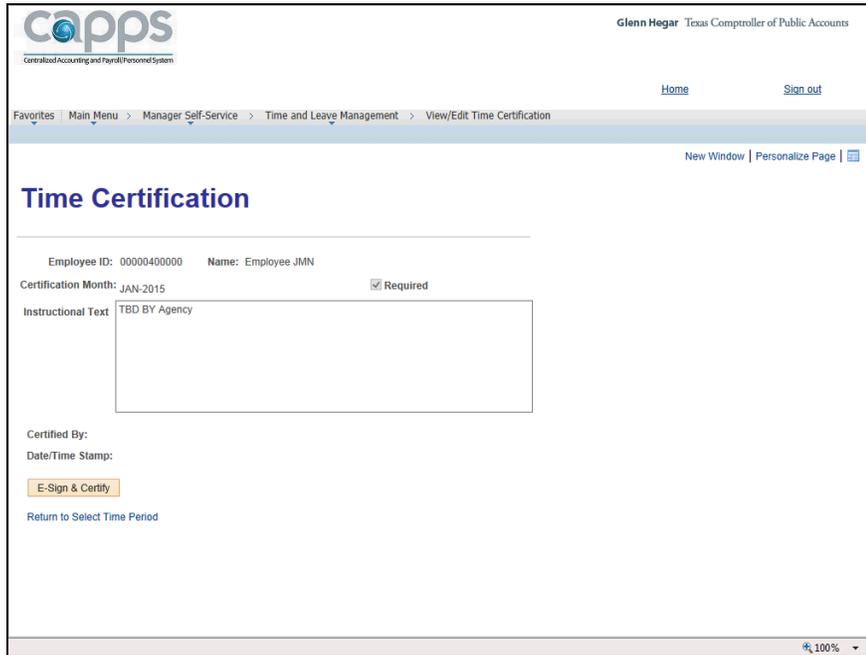
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Step	Action
25.	<p>The system displays a Message that April 21 is a skeleton crew holiday.</p> <p>The Message is a reminder to make sure that the correct Time Reporting Codes for that date are being used.</p> <p>Click the OK button.</p> 
26.	<p>The system confirms that the Save was successful.</p> <p>Click the OK button.</p> 
27.	<p>There are other options relating to Holiday hours:</p> <p>Non-Scheduled Holiday: If a holiday falls on a day that the employee is not scheduled and the employee physically works the holiday, then the employee enters their hours worked with the REGHR TRC. This will result in the employee banking comp time for the hours worked. The employee will also earn COMPH in their Comp Time leave balance to account for holiday hours they are eligible for. This will allow them to take the hours for the holiday on another day (Holiday Bank).</p> <p>Work More Than The Authorized Hours: If an employee is authorized for 8 hours on a holiday, but is scheduled for 10 hours and physically works 10 hours, then the employee needs to enter 8 hours REGHW and 2 hours REGHR. If this same employee does not work on the holiday, then they need to enter 2 hours of Leave on the holiday, or CAPPS will automatically deduct available leave up to 2 hours or create an exception if 2 hours of leave is not available. (Note: The available leave must be from one leave type.)</p>
28.	<p>4. Certify time for a Direct Report.</p> <p>Click the Time and Leave Management button.</p> 
29.	<p>Click the View/Edit Time Certification menu.</p> 
30.	<p>The use of Time Certification will be determined by the agency.</p> <p>Click the Employee JMN link.</p> <p>Employee JMN</p>



Step	Action
31.	<p>Your employee has not certified her time for the January 2015 time period.</p> <p>Click the Period link.</p> <p>JAN-2015</p>



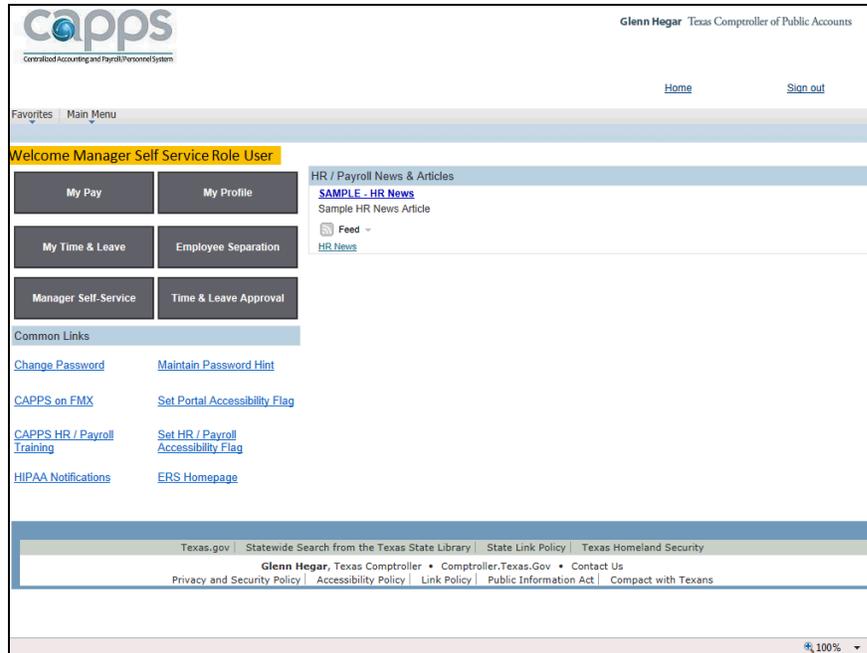
Step	Action
32.	<p>The system displays the Time Certification page.</p> <p>Note: Employees can certify their hours on their Timesheet.</p> <p>Click the E-Sign & Certify button.</p> 
33.	<p>The Save was successful.</p> <p>Click the OK button.</p> 
34.	<p>The employee's time for January has now been certified.</p> <p>If the time has been certified by the manager, then the manager's name will appear in the Certified By: field. The Date/Time Stamp: field shows when this certification was done.</p> <p>If the employee had certified the time, then the system would have displayed the employee's name.</p>
35.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

View Time

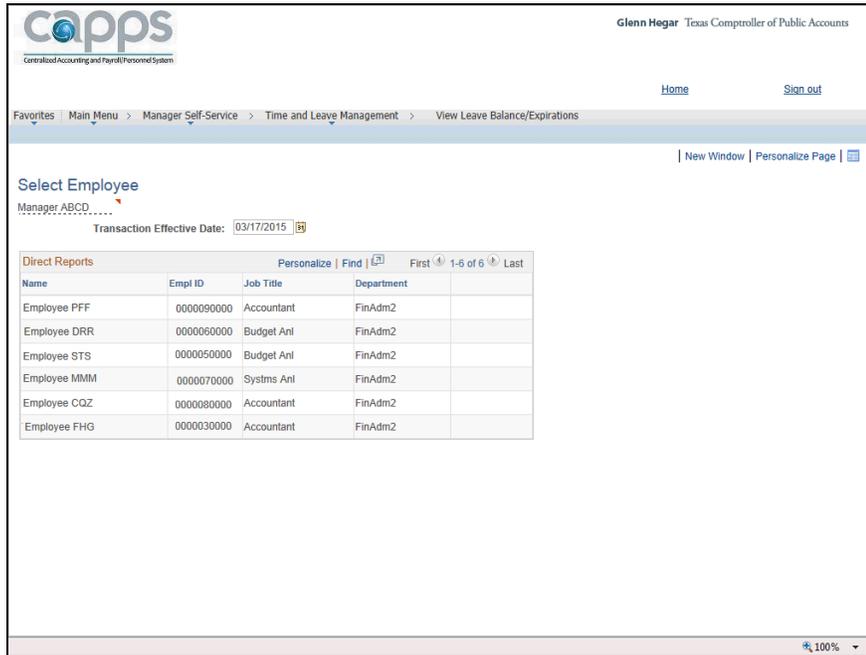
Section 1 - Lesson 2 Exercises - View Time

Procedure

This lesson shows how the Manager is able to view an employee's Leave Balance and Expiration.

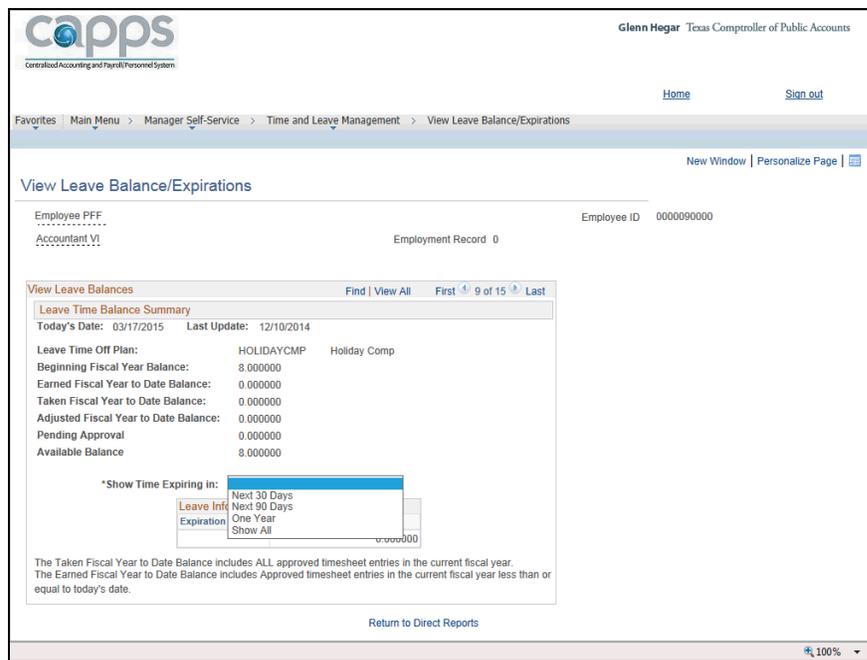


Step	Action
1.	Navigate to the Manager Timesheet . Click the Manager Self-Service button. 
2.	Click the Time and Leave Management link. 
3.	Click the View Leave Balance/Expirations link. 



Step	Action
4.	<p>Choose the employee whose leave you want to view.</p> <p>Click the Employee PFF link.</p> <p>Employee PFF</p>
5.	<p>The Leave Time Balance Summary displays all Comp Time plans, balances, earned hours, adjustments, hours taken, and expiring hours.</p> <p>Click the Show next row (Alt+.) button.</p> <p></p>
6.	<p>The employee has an Available Balance of 27.00 hours of Annual Leave.</p> <p>Click the Show next row (Alt+.) button.</p> <p></p>
7.	<p>Row 3 shows FLSA Overtime for this employee.</p> <p>Click the Show next row (Alt+.) button.</p> <p></p>

Step	Action
8.	<p>Row 4 shows Compensatory Time for this employee.</p> <p>Click the Show next row (Alt+.) button.</p> 
9.	<p>In this exercise, we have jumped ahead to Row 9, the Holiday Comp section.</p> <p>The employee has 8 hours of Holiday Comp time. The manager can see when this time will expire.</p> <p>Click the Show Time Expiring in list.</p> 



Step	Action
10.	<p>Your options include:</p> <p>Next 30 Days; Next 90 Days; One Year; or Show All.</p> <p>Click the Show All list item.</p> <p>Show All</p>

Step	Action
11.	The system shows that 8.00 hours of Holiday Comp time will expire on August 27, 2015.
12.	Congratulations! You have successfully completed this lesson. End of Procedure.

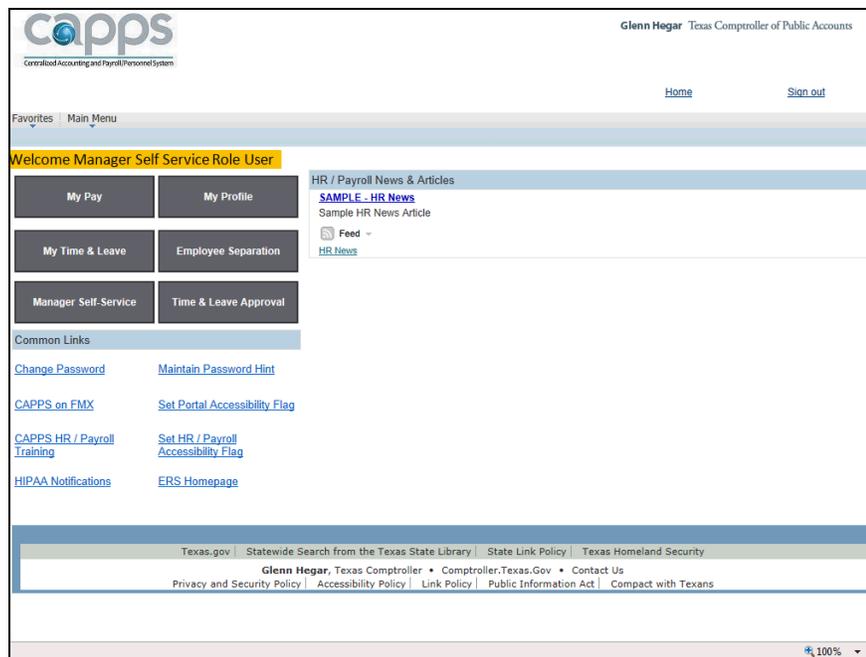
Maintain Shift Pay Rate

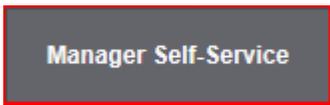
Section 1 - Lesson 3 Exercises - Maintain Shift Pay Rate

Procedure

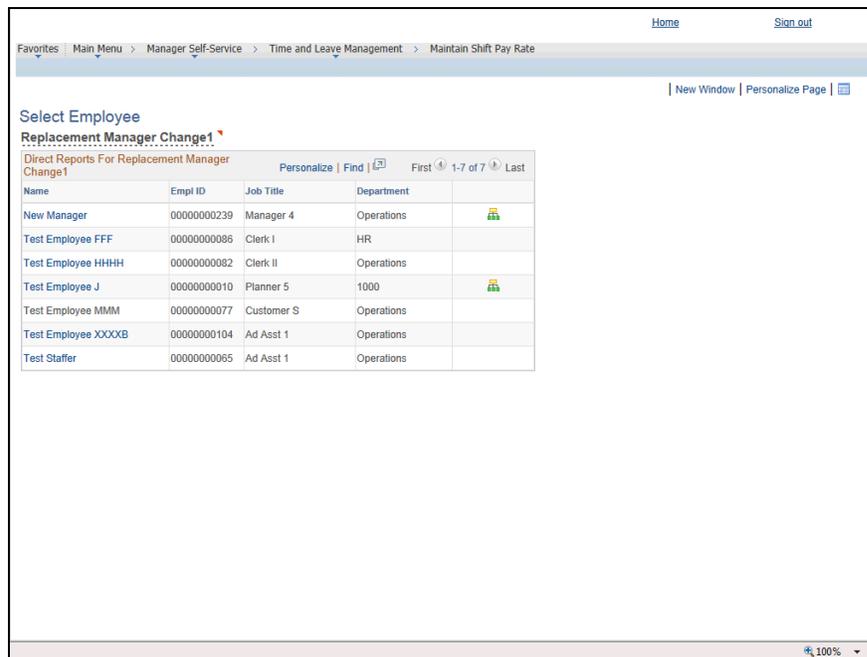
In order to receive regular shift pay, an agency must be authorized to pay shift, and an employee must be set up with the correct shift configuration in Job and Time & Labor.

On the **Maintain Shift Pay Rate** page, the manager can only change the shift rate.



Step	Action
1.	Click the Manager Self-Service button. 

Step	Action
2.	Navigate to the Maintain Shift Pay Rate page. Click the Time and Leave Management link. Time and Leave Management
3.	Click the Maintain Shift Pay Rate link. Maintain Shift Pay Rate

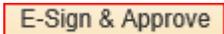


Step	Action
4.	Choose the employee whose shift rate is going to change. Click the Test Staffer link. Test Staffer
5.	The system opens the Shift Pay Rate Change page, and displays the Current Status of the shift in one column, along with a Proposed Status in the other column.

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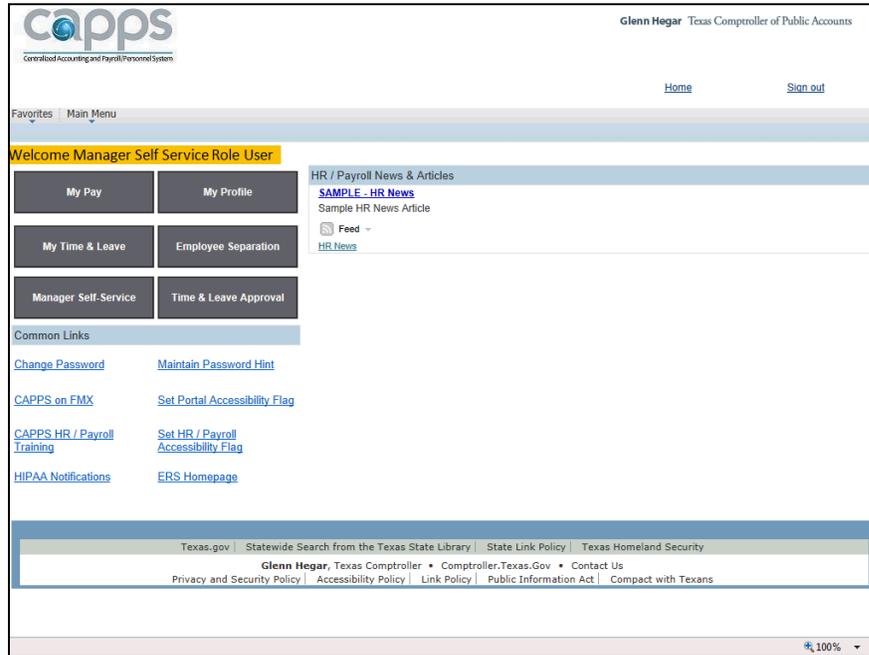
Step	Action
6.	The employee currently receives a 1.0% shift rate; the proposed rate increase is to 1.5%. Enter "1.5" into the Regular Evening Shift(%) field. 
7.	The new rate (1.5%) has been entered in the shift rate field. To see the dollar amount of the change, tab out of the field. Press [Tab] .
8.	The dollar amount of the Regular Evening Shift(%) has changed from \$23.50 to \$35.25. The Base Pay Plus Shift changed from \$2,373.50 to \$2,385.25.
9.	Click the E-Sign & Approve button. 
10.	The Save was successful. Click the OK button. 
11.	Congratulations! You have successfully completed this lesson. End of Procedure.

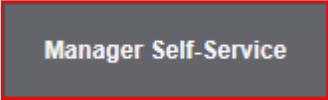
Leave Without Pay

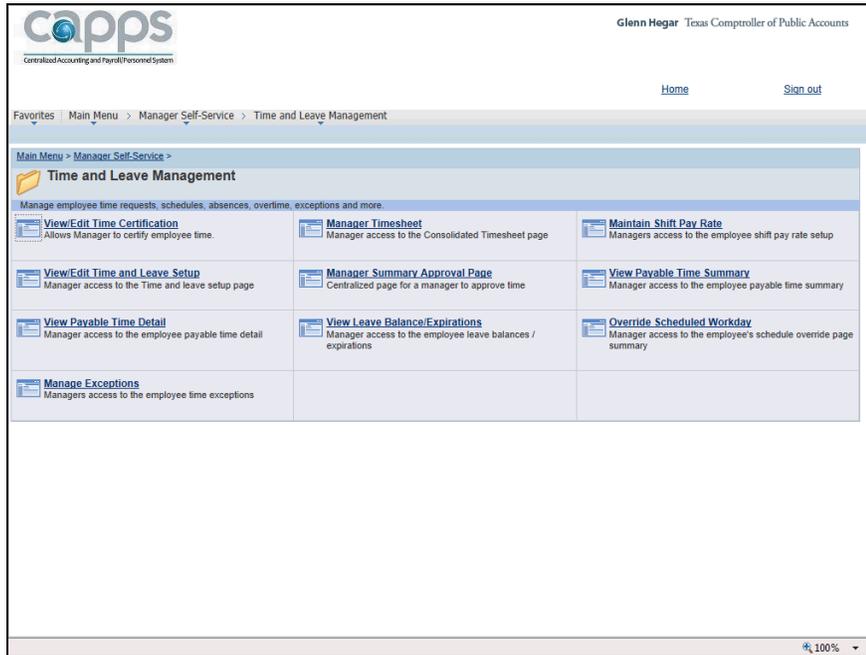
Section 1 - Lesson 4 Exercises - Leave Without Pay

Procedure

In this lesson, an employee will take one week of **Leave Without Pay** in April.

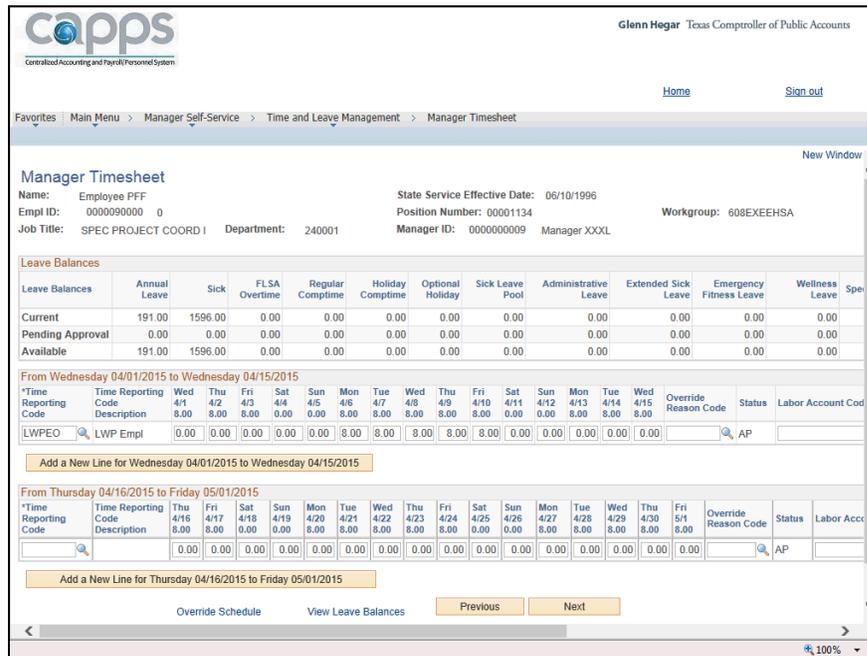


Step	Action
1.	<p>Navigate to the Manager Timesheet.</p> <p>Click the Manager Self-Service button.</p> 
2.	<p>Click the Time and Leave Management link.</p> 



Step	Action
3.	Click the Manager Timesheet link. 
4.	Choose the employee taking Leave Without Pay . Click the Employee PFF link. 
5.	Find the appropriate *Time Reporting Code for the leave. Click the Look up Time Reporting Code (Alt+5) button. 
6.	The employee is taking Leave Without Pay - Employee , thus you do <i>not</i> have to notify the FMLA administrator. Click the LWPEO link. 
7.	The employee will take 40 hours of Leave Without Pay during the work week April 6 to April 10. Enter the desired information into the Mon 4/6 0.00 field. Enter "8.00" . 

Step	Action
8.	Enter the desired information into the Tue 4/7 0.00 field. Enter " 8.00 ". 
9.	Enter the desired information into the Wed 4/8 0.00 field. Enter " 8.00 ". 
10.	Enter the desired information into the Thu 4/9 0.00 field. Enter " 8.00 ". 
11.	Enter the desired information into the Fri 4/10 field. Enter " 8.00 ". 



Manager Timesheet

Name: Employee PFF State Service Effective Date: 06/10/1996
 Empl ID: 0000090000 0 Position Number: 00001134 Workgroup: 608EXEEHSA
 Job Title: SPEC PROJECT COORD I Department: 240001 Manager ID: 000000009 Manager XXXL

Leave Balances	Annual Leave	Sick	FLSA Overtime	Regular Compline	Holiday Compline	Optional Holiday	Sick Leave Pool	Administrative Leave	Extended Sick Leave	Emergency Fitness Leave	Wellness Leave	Spe
Current	191.00	1596.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pending Approval	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Available	191.00	1596.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

From Wednesday 04/01/2015 to Wednesday 04/15/2015

*Time Reporting Code	Time Reporting Description	Wed 4/1 8.00	Thu 4/2 8.00	Fri 4/3 8.00	Sat 4/4 0.00	Sun 4/5 0.00	Mon 4/6 8.00	Tue 4/7 8.00	Wed 4/8 8.00	Thu 4/9 8.00	Fri 4/10 8.00	Sat 4/11 0.00	Sun 4/12 0.00	Mon 4/13 8.00	Tue 4/14 8.00	Wed 4/15 8.00	Override Reason Code	Status	Labor Account Cod
LWPEO	LWP Empl	0.00	0.00	0.00	0.00	0.00	8.00	8.00	8.00	8.00	8.00	0.00	0.00	0.00	0.00	0.00		AP	

Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015

From Thursday 04/16/2015 to Friday 05/01/2015

*Time Reporting Code	Time Reporting Description	Thu 4/16 8.00	Fri 4/17 8.00	Sat 4/18 0.00	Sun 4/19 0.00	Mon 4/20 8.00	Tue 4/21 8.00	Wed 4/22 8.00	Thu 4/23 8.00	Fri 4/24 8.00	Sat 4/25 0.00	Sun 4/26 0.00	Mon 4/27 8.00	Tue 4/28 8.00	Wed 4/29 8.00	Thu 4/30 8.00	Fri 5/1 8.00	Override Reason Code	Status	Labor Acco
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		AP	

Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015

Override Schedule View Leave Balances Previous Next

Step	Action
12.	Click the Vertical Scrollbar to scroll down the page.

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Home Sign out

Favorites Main Menu > Manager Self-Service > Time and Leave Management > Manager Timesheet

Name: Employee PFF State Service Effective Date: 06/10/1996
 Empl ID: 0000090000 0 Position Number: 00001134 Workgroup: 608EXEEHSA
 Job Title: SPEC PROJECT COORD I Department: 240001 Manager ID: 000000009 Manager XXXL

Leave Balances	Annual Leave	Sick	FLSA Overtime	Regular Comptime	Holiday Comptime	Optional Holiday	Sick Leave Pool	Administrative Leave	Extended Sick Leave	Emergency Fitness Leave	Wellness Leave	Spe
Current	191.00	1596.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pending Approval	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Available	191.00	1596.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

From Wednesday 04/01/2015 to Wednesday 04/15/2015

*Time Reporting Code	Time Reporting Description	Wed 4/1	Thu 4/2	Fri 4/3	Sat 4/4	Sun 4/5	Mon 4/6	Tue 4/7	Wed 4/8	Thu 4/9	Fri 4/10	Sat 4/11	Sun 4/12	Mon 4/13	Tue 4/14	Wed 4/15	Override Reason Code	Status	Labor Account Code
LWPEO	LWP Empl	0.00	0.00	0.00	0.00	0.00	8.00	8.00	8.00	8.00	8.00	0.00	0.00	0.00	0.00	0.00		AP	

Add a New Line for Wednesday 04/01/2015 to Wednesday 04/15/2015

From Thursday 04/16/2015 to Friday 05/01/2015

*Time Reporting Code	Time Reporting Description	Thu 4/16	Fri 4/17	Sat 4/18	Sun 4/19	Mon 4/20	Tue 4/21	Wed 4/22	Thu 4/23	Fri 4/24	Sat 4/25	Sun 4/26	Mon 4/27	Tue 4/28	Wed 4/29	Thu 4/30	Fri 5/1	Override Reason Code	Status	Labor Account Code
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		AP	

Add a New Line for Thursday 04/16/2015 to Friday 05/01/2015

Override Schedule View Leave Balances Previous Next

E-Sign & Approve Return to Direct Reports Maintain Leave of Absence Manager Summary Approval Page

Step	Action
13.	<p>When you click the E-Sign & Approve button, the employee's Leave Without Pay is approved.</p> <p>Click the E-Sign & Approve button.</p> <p>E-Sign & Approve</p>
14.	<p>The Save was successful.</p> <p>Click the OK button.</p> <p>OK</p>
15.	<p>Note: Longevity is not paid if an employee is on Leave Without Pay for the first scheduled day of the month.</p> <p>In this lesson, however, the employee worked on the first scheduled day of the month, and Longevity pay was <i>not</i> affected.</p>
16.	<p>Note: When LWOP is entered and approved on a Timesheet, the next available earnings will be docked.</p> <p>If LWOP is removed from a Timesheet, the next available earnings will be credited.</p>
17.	<p>Note: If LWOP is at least one calendar month, then the employee's service date is decreased by that amount of time.</p> <p>In this lesson, there is <i>no effect</i> on the employee's service date.</p>

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

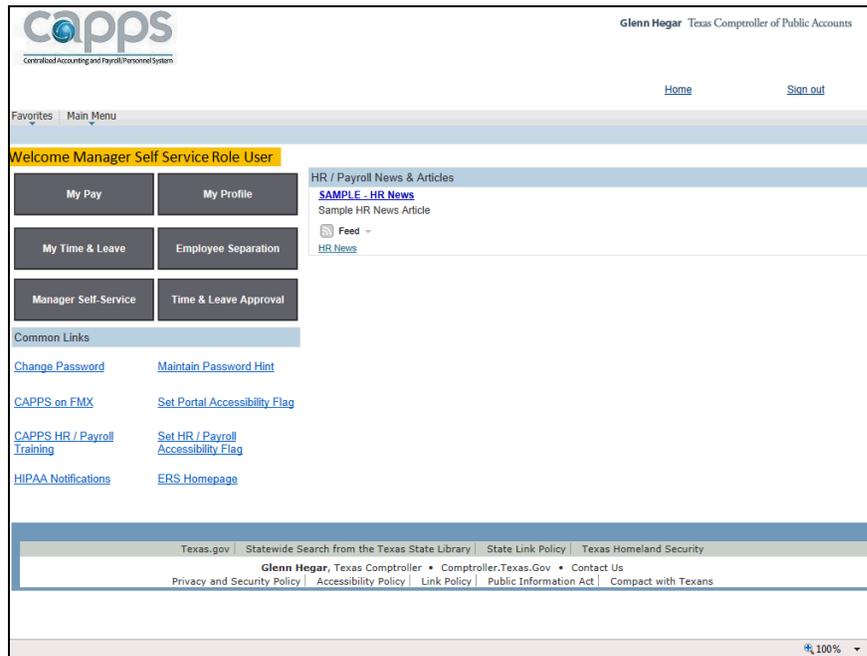
Employee Schedules

Section 1 - Lesson 5 Exercises - Employee Schedules

Procedure

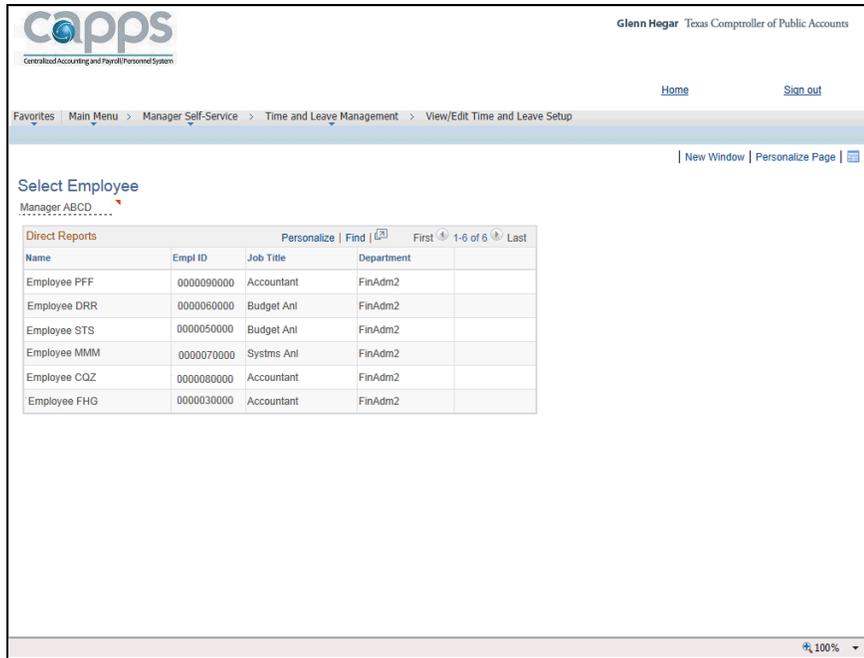
This lesson shows how a manager can:

1. Assign a new schedule for a future date, and
2. Override a schedule for the current week.



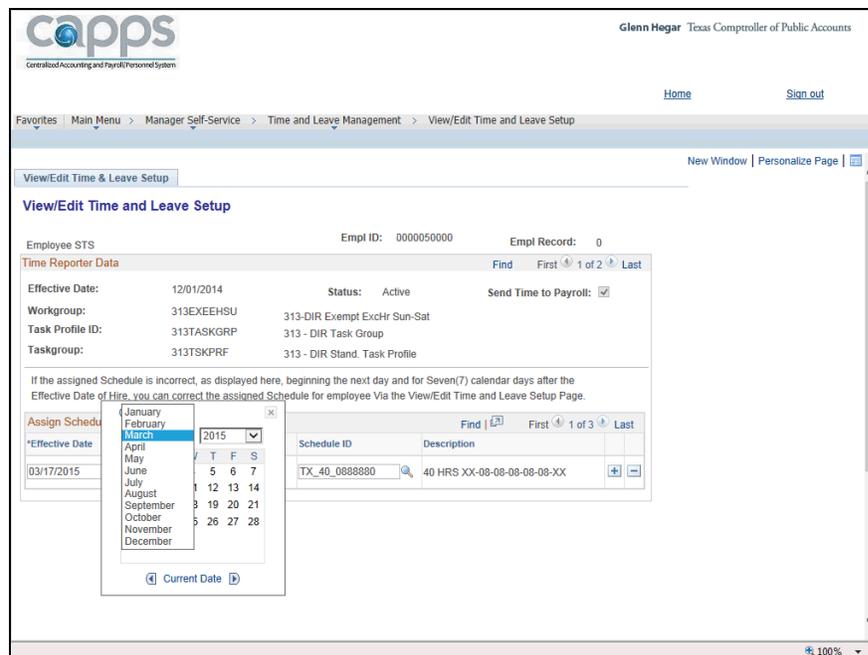
Step	Action
1.	Click the Manager Self-Service button. 
2.	Click the Time and Leave Management link. <u>Time and Leave Management</u>

Step	Action
3.	Click the View/Edit Time and Leave Setup link. View/Edit Time and Leave Setup



Step	Action
4.	Choose the employee whose schedule needs to be changed. Click the Employee STS link. Employee STS
5.	This chart shows you how to interpret a Schedule ID and Description . The Schedule ID Breakdown shows the Alpha Characters used in place of 2-digit numbers. For scheduling, the workweek begins on Sunday.
6.	The View/Edit Time and Leave Setup page provides an explanation on how to handle new hires. Notice that you have a limited time period (seven (7) calendar days after the Effective Date of Hire) in which to correct a new hire's Schedule.

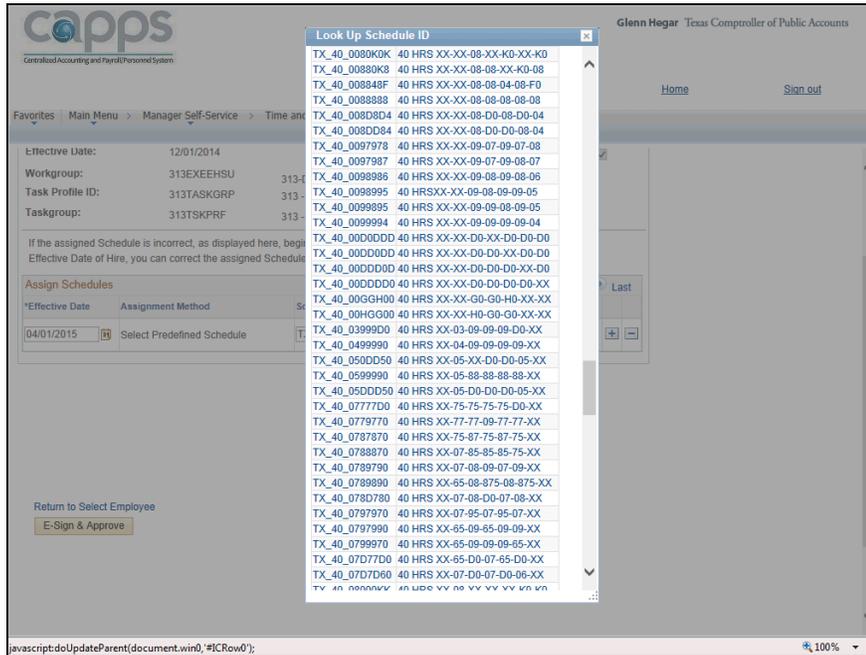
Step	Action
7.	<p>1. Assign a new schedule for a future date.</p> <p>As the manager, you will be changing this employee's schedule.</p> <p>Click the Add a new Schedule (Alt+7) button.</p> 
8.	<p>In CAPPS HR/Payroll, all schedules start on a Sunday.</p> <p>The system will correctly interpret an employee's FLSA workweek for comptime/overtime calculations, even when it involves a Saturday or Sunday workday.</p> <p>Click the Choose a date (Alt+5) button.</p> 
9.	<p>Click the dropdown button to activate the menu.</p> 

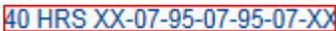
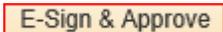


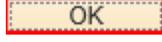
Step	Action
10.	<p>Click the April list item.</p> <p>April</p>

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Step	Action
14.	Click the 40 HRS XX-07-95-07-95-07-XX link. 
15.	Click the E-Sign & Approve button. 
16.	The system has successfully saved the new schedule for this employee. Click the OK button. 
17.	Click the Time and Leave Management menu. 
18.	2. Override the schedule for the current week. Click the Override Scheduled Workday menu. 

Step	Action
19.	<p>In this example, Employee DRR will work on Saturday, and take Monday off. This change is only for the current week, and the change can be made on the Override Scheduled Workday page.</p> <p>Click the Look up Saturday 03/21/2015 (Alt+5) button.</p> 
20.	<p>The hours are listed in 1/4 hour increments.</p> <p>The employee will work 8 hours on Saturday for this week only.</p> <p>Click the 8 link.</p> 
21.	<p>The employee will not work on Monday, for this week only.</p> <p>Delete Monday's hours.</p> <p>Press [Delete].</p>
22.	<p>Enter 0.00 hours in Monday's field.</p> <p>Enter the desired information into the Monday 03/16/2015 field. Enter "0.00".</p>
23.	<p>The employee's hours for the week = 40.00.</p> <p>Note: The approval on this page is for the change in schedule for this week only. You are not approving hours worked, you are approving hours scheduled.</p> <p>Click the E-Sign & Approve button.</p> 
24.	<p>Click the OK button.</p> 
25.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Manager Approvals

Section 1 - Lesson 6 Exercises - Manager Approvals

Procedure

Hours entered and submitted by employees need approval from a manager.

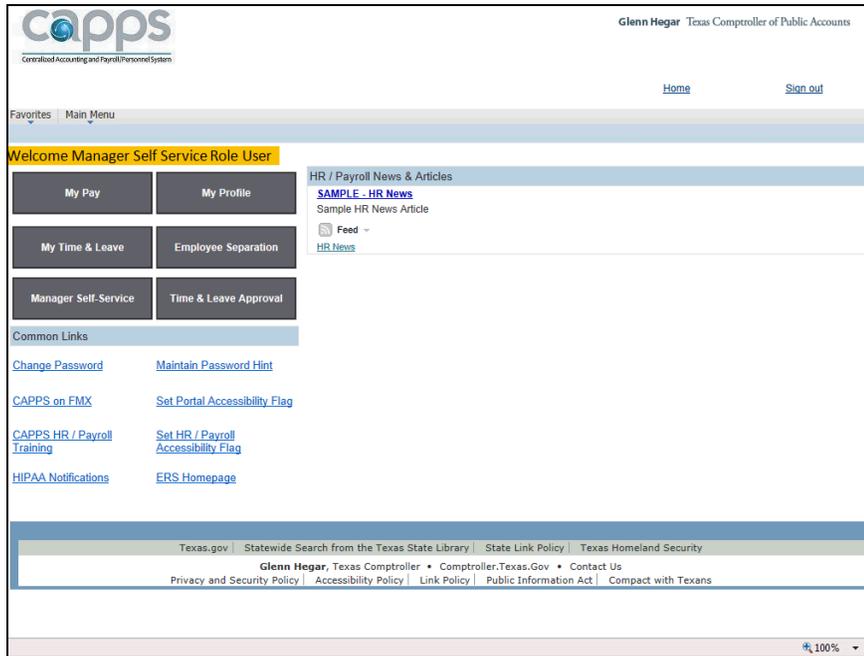
CAPPS HR/PAYROLL

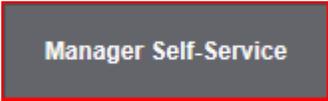
EUT Course



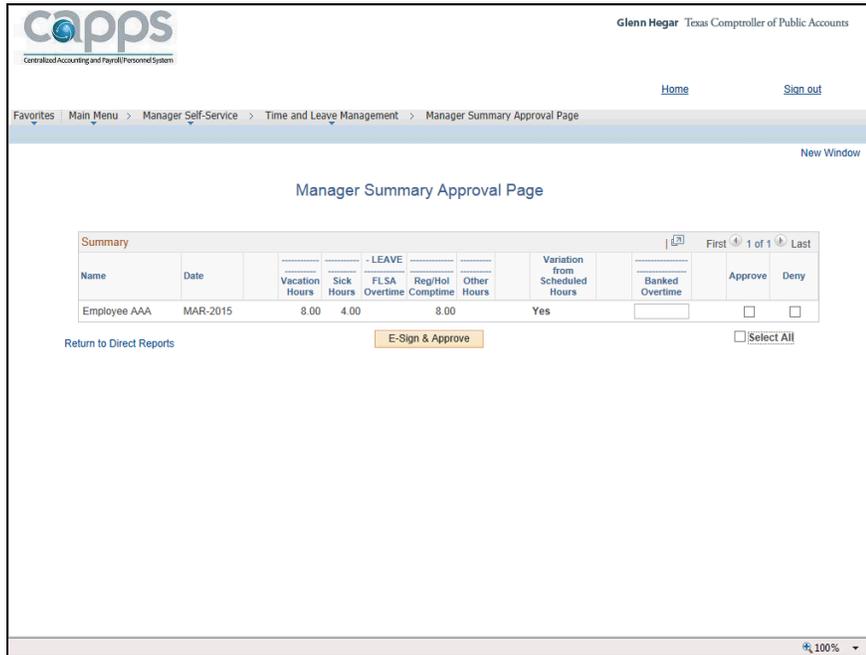
A manager can approve hours on the **Manager Summary Approval** page or the **Manager Timesheet**.

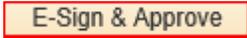
Hours entered by a manager on an employee's **Timesheet** are approved when the manager clicks on the **E-Sign and Approve** button.



Step	Action
1.	Navigate to the Manager Summary Approval page. Click the Manager Self-Service button. 
2.	Click the Time and Leave Management link. 
3.	Click the Manager Summary Approval Page link. 

Step	Action
4.	<p>The system opens the Manager Summary Approval Page.</p> <p>Note: Your agency may use this page for approvals, or it may use this page as a view only page.</p> <p>View only access means that the Approve and Deny boxes will be grayed out. If that is the case, the manager must then go to the Timesheet - using the employee name link - in order to approve or deny the hours.</p>
5.	<p>In this example, the manager has one employee with hours that need approval.</p> <p>A manager can use the Manager Summary Approval page to see which employees need hours approved. In addition, a reminder process has been created to notify managers that they have hours to approve. Those hours are in an NA (Needs Approval) status.</p> <p>Ten (10) days after the create date, if the hours are still in an NA status, an email is auto-generated and sent to the manager. After 17 days (if the hours are still in an NA status), another email is auto-generated and sent to the next level manager.</p>
6.	<p>For those agencies who choose to use the Manager Summary Approval page for approvals (in other words, this page is not view only), a manager can approve or deny hours for an employee for the entire month.</p>
7.	<p>On the Timesheet, the manager can deny hours by row.</p> <p>There might be multiple days with hours on a row with Needs Approval status, but if Deny is checked, the system denies everything on that row still in an NA status.</p> <p>When the manager clicks the E-Sign & Approve button, the system will automatically approve all hours in an NA status for the month currently being viewed.</p>



Step	Action
8.	In this example, the manager has chosen to approve the hours. Click the Approve option. 
9.	Note: We recommend that you view an employee's Timesheet before approving his time. Click the E-Sign & Approve button. 
10.	Click the OK button. 
11.	The employee's hours have been approved; the system shows no employees needing hours approved on the Manager Summary Approval Page .
12.	Congratulations! You have successfully completed this lesson. End of Procedure.

Section 2 - Reporting

Section 2 - Reporting

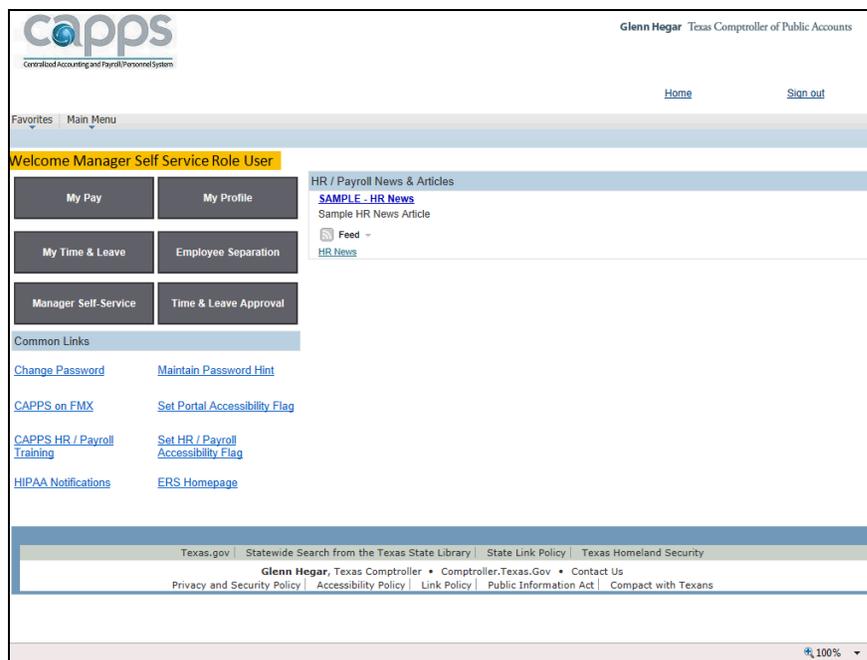
Reporting

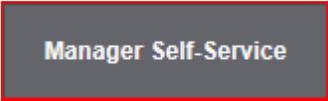
Section 2 - Lesson 1 Exercises - Reporting

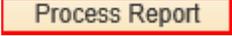
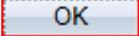
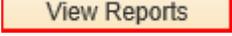
Procedure

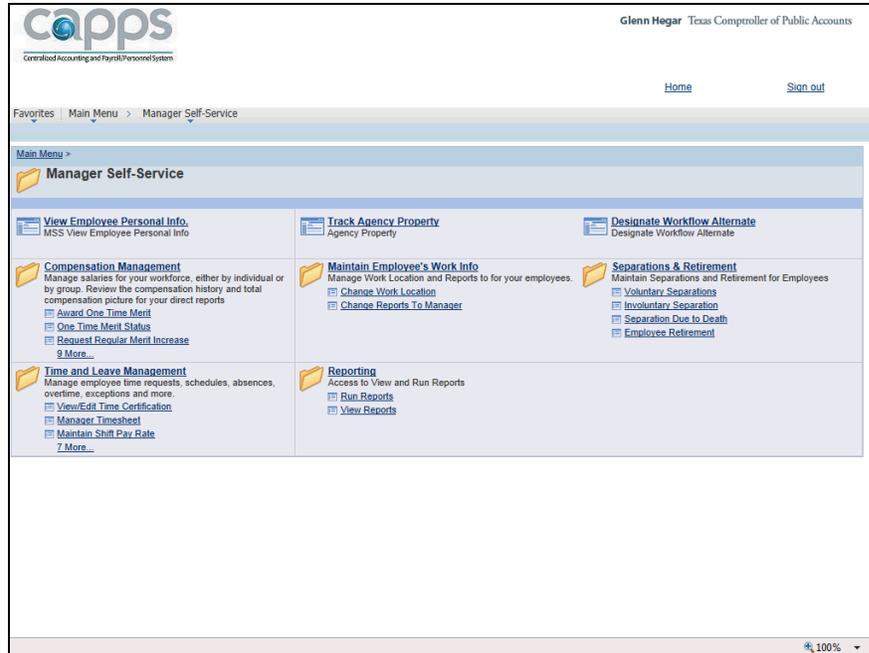
CAPPS has many reports that managers can run in order to gather information on their direct reports.

In this lesson you will learn how to run the **Employee Monthly Time & Leave Report**, as well as the **Time Reporting Codes by Date Report**.



Step	Action
1.	Navigate to the Run Reports page. Click the Manager Self-Service button. 
2.	Click the Reporting link. 
3.	Click the Run Reports link. 

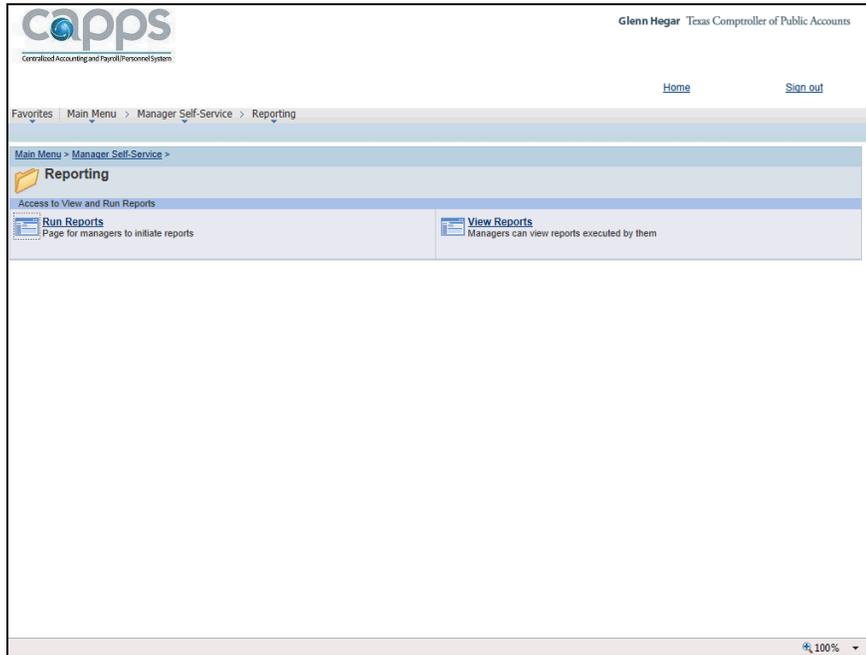
Step	Action
4.	<p>The system lists several reports on the Reports Home page.</p> <p>Click the Employee Monthly Time & Leave Report link.</p> <p>Employee Monthly Time & Leave Report</p>
5.	<p>The report can be run for all of your Direct Reports, or you can select for specific employees.</p> <p>Click the Select All button to select all your Direct Reports.</p> <p></p>
6.	<p>Enter the last day of the month for the report you are running.</p> <p>Enter the desired information into the As Of Date field. Enter "02/28/2015".</p> <p>: <input type="text"/></p>
7.	<p>In the Report Request Parameters section, you have the option of Show LAC on the second page of the report.</p> <p>You also have the option to Show Attestment on the third page of the report. Agencies that require their employees to sign a hard copy will have a space for their signatures.</p>
8.	<p>Click the Process Report button.</p> <p></p>
9.	<p>The system displays the Message that the report has been scheduled.</p> <p>Click the OK button.</p> <p></p>
10.	<p>To see if the report has successfully completed, click the View Reports button.</p> <p></p>
11.	<p>On the View Reports page, the Process List shows whether the report has completed. Possible Run Status values include Queued, Processing, and Success.</p> <p>When Run Status = Success, the report is ready to view.</p> <p>Click the View Report link.</p> <p>View Report</p>
12.	<p>The report displays (among other things) Beginning and Ending Balances for most types of Leave; Leave Accrued/Earned; Leave Expiring within the next 3 months; Current Annual Leave Balance; Projected Accrual(s); Carry Over Maximum; and Hours Converting to Sick Leave for each of your direct reports, one per page.</p>

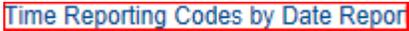


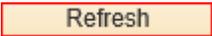
Step	Action
13.	<p>Let's run another report.</p> <p>Click the Reporting link.</p> <p>Reporting</p>

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Step	Action
14.	Click the Run Reports link. 
15.	Now, we will run a second report from the Reports page. Click the Time Reporting Codes by Date Report link. 
16.	Run the report for the month of January. Enter the desired information into the Start Date field. Enter " 01/01/2015 ". 
17.	Enter the desired information into the End Date field. Enter " 01/31/2015 ". 
18.	Find the Time Reporting Code you want by entering the first two letters of the code. Enter the desired information into the TRC field. Enter " re ". 
19.	Click the Look up TRC (Alt+5) button. 

Step	Action
20.	<p>The Look Up TRC displays any Time Reporting Code starting with the two letters "RE."</p> <p>Click on the REGHR code in the list.</p> <p>REGHR</p>
21.	<p>Again, you have the option to Select All your Direct Reports, or you can choose selectively. Choose Employee DEX for the report.</p> <p>Click the Include checkbox for Employee DEX.</p> <p><input type="checkbox"/></p>
22.	<p>Click the Process Report button.</p> <p></p>
23.	<p>The Report has been scheduled.</p> <p>Click the OK button.</p> <p></p>
24.	<p>Click the View Reports button.</p> <p></p>
25.	<p>The View Reports page shows you the Process List.</p> <p>The Run Status of your report is Queued, which means that your report is not yet ready to view.</p> <p>Click the Refresh button.</p> <p></p>
26.	<p>Now the Run Status = Success.</p> <p>Click the View Report link.</p> <p>View Report</p>
27.	<p>Total REGHR hours for this employee are shown by date.</p>
28.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Section 3 - View Employee Personal Data

Section 3 - View Employee Personal Data

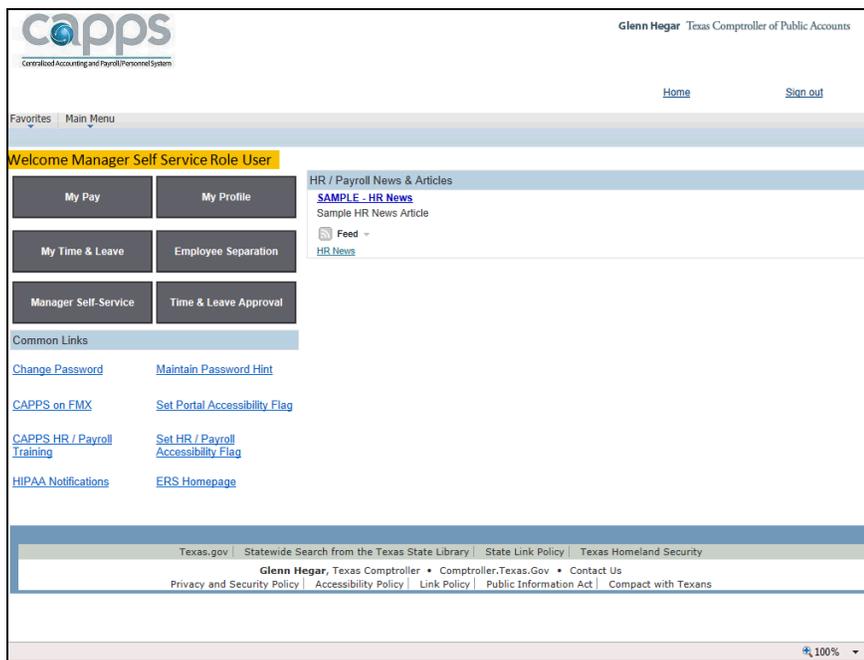
View Employee Personal Data

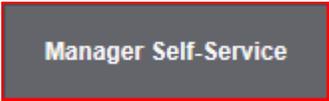
Section 3 - Lesson 1 Exercises - View Employee Personal Data

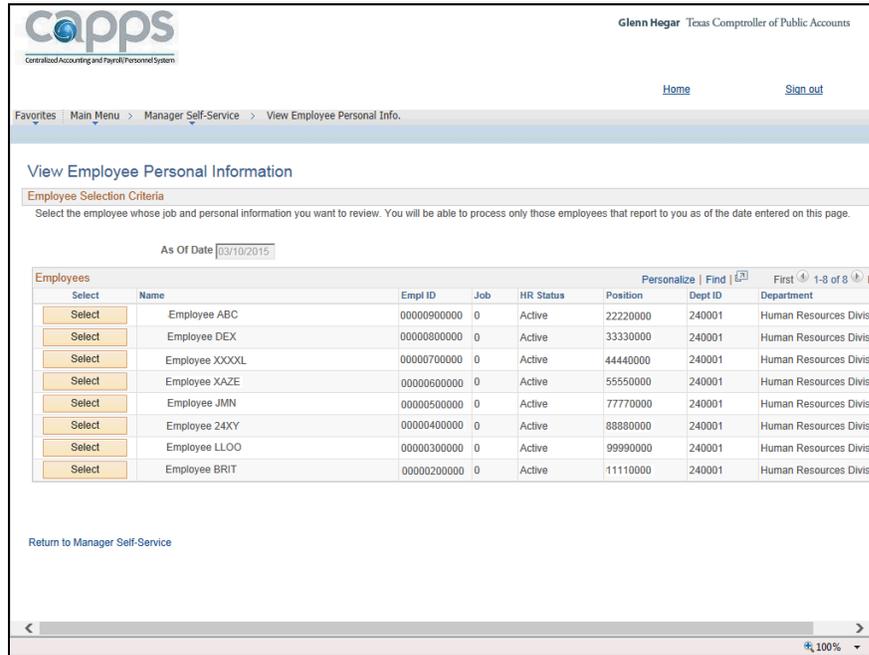
Managers can view their direct reports' personal information by accessing the View Employee Personal Info page in MSS.

Procedure

In the **View Employee Personal Data** lesson, you will learn about the pages that provide personal information for a manager's direct and indirect reports.



Step	Action
1.	Click the Manager Self-Service button. 
2.	Click the View Employee Personal Info. link. 



Step	Action
3.	Click the Select button for Employee ABC. 
4.	The Employee Information page displays information about a manager's employee. It also contains links to other pages where changes can be made to the employee's record, such as Change Location and Reporting Change .
5.	Click the Home and Mailing Addresses link. Home and Mailing Addresses
6.	CAPPS HR/Payroll is using only the Home Address section. The Mailing Address section is not being used at this time.
7.	Click the Return to Employee Information link. 
8.	Click the Phone Numbers link. 

Step	Action
9.	<p>The system displays the employee's phone numbers.</p> <p>An employee - using Employee Self Service - can designate a Preferred phone number.</p> <p>Click the Return to Employee Information link.</p> <p>Return to Employee Information</p>
10.	<p>Click the Birthday link.</p> <p>Birthday</p>
11.	<p>The system shows the employee's birth month and day, but not the year.</p> <p>Click the Return to Employee Information link.</p> <p>Return to Employee Information</p>
12.	<p>Click the Email Addresses link.</p> <p>Email Addresses</p>
13.	<p>An employee - using Employee Self Service - can enter a personal email address, and can select the Preferred option.</p> <p>Click the Return to Employee Information link.</p> <p>Return to Employee Information</p>
14.	<p>Click the Emergency Contacts link.</p> <p>Emergency Contacts</p>
15.	<p>An employee can designate one or more Emergency Contacts. If an employee creates multiple entries, one can be designated as the Primary Contact.</p> <p>Click the Return to Employee Information link.</p> <p>Return to Employee Information</p>
16.	<p>Total Compensation, Change Location, and Reporting Change will be shown in another lesson.</p>
17.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

Section 4 - Maintain Employee's Work Information

Section 4 - Maintain Employee's Work Information

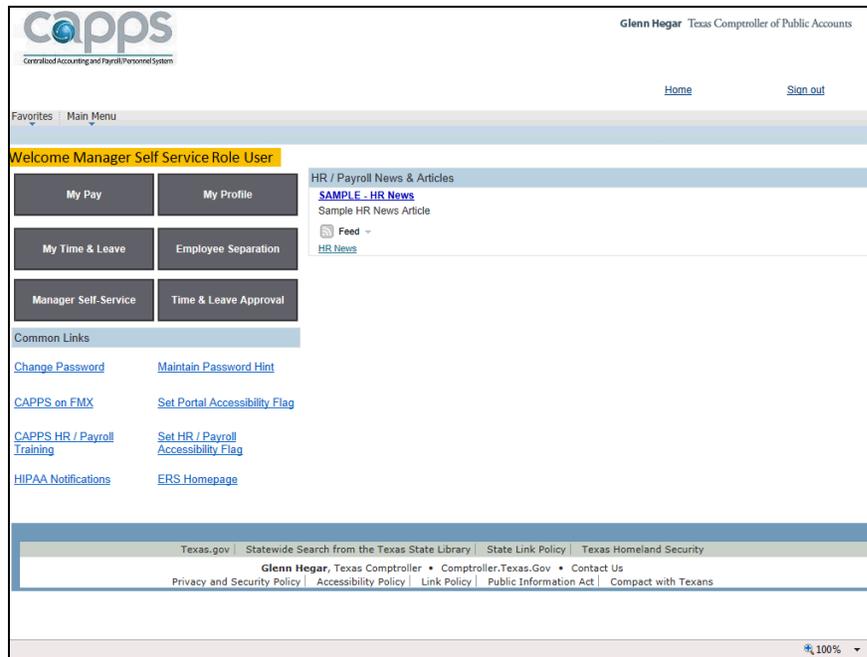
Maintain Employee's Work Information

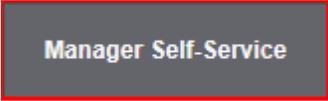
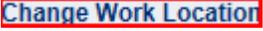
Section 4 - Lesson 1 Exercises - Maintain Employee's Work Information

Procedure

In this exercise you will learn how to:

1. Change an Employee's Work Location
2. Change an Employee's Reports To Manager
3. Review or Enter Agency Property



Step	Action
1.	Click the Manager Self-Service button. 
2.	1. Change an Employee's Work Location The employee's work location has been moved to the Sam Houston building. Click the Maintain Employee's Work Info link. 
3.	Click the Change Work Location link. 

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Home Sign out

Favorites Main Menu > Manager Self-Service > Maintain Employee's Work Info > Change Work Location

New Window Personalize Page

Change Location

Select Employee

Manager: ABCD

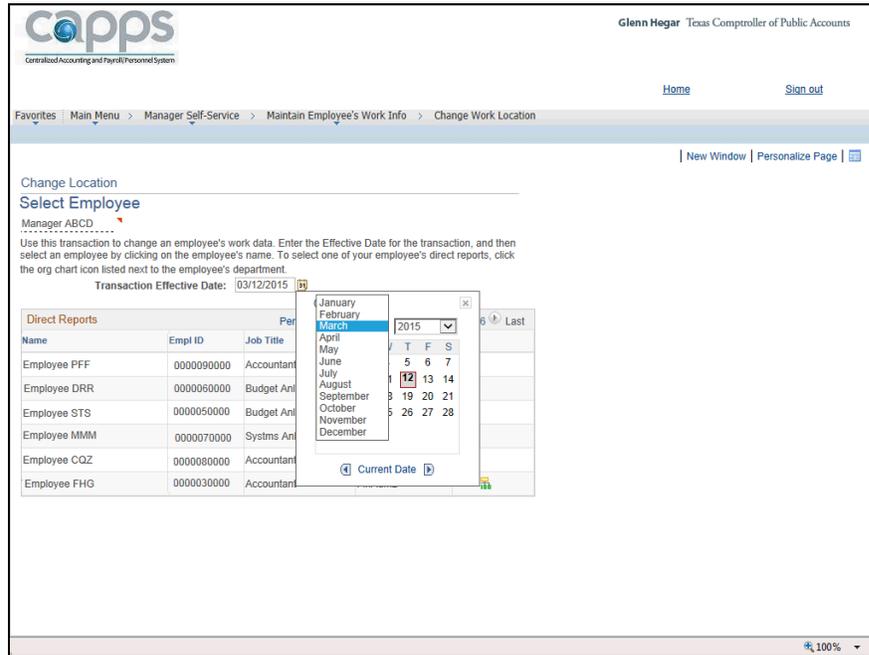
Use this transaction to change an employee's work data. Enter the Effective Date for the transaction, and then select an employee by clicking on the employee's name. To select one of your employee's direct reports, click the org chart icon listed next to the employee's department.

Transaction Effective Date: 03/12/2015

Name	Empl ID	Job Title	Department	
Employee PFF	0000090000	Accountant	FinAdm2	
Employee DRR	0000060000	Budget Anl	FinAdm2	
Employee STS	0000050000	Budget Anl	FinAdm2	
Employee MMM	0000070000	Systems Anl	FinAdm2	
Employee COZ	0000080000	Accountant	FinAdm2	
Employee FHG	0000030000	Accountant	FinAdm2	

100%

Step	Action
4.	<p>Enter the date the employee starts work at the new location.</p> <p>Click the Choose a date (Alt+5) button.</p> 
5.	<p>Click the button to the right of the Month field.</p> 



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Home Sign out

Favorites Main Menu > Manager Self-Service > Maintain Employee's Work Info > Change Work Location

New Window Personalize Page

Change Location

Select Employee

Manager ABCD

Use this transaction to change an employee's work data. Enter the Effective Date for the transaction, and then select an employee by clicking on the employee's name. To select one of your employee's direct reports, click the org chart icon listed next to the employee's department.

Transaction Effective Date: 03/12/2015

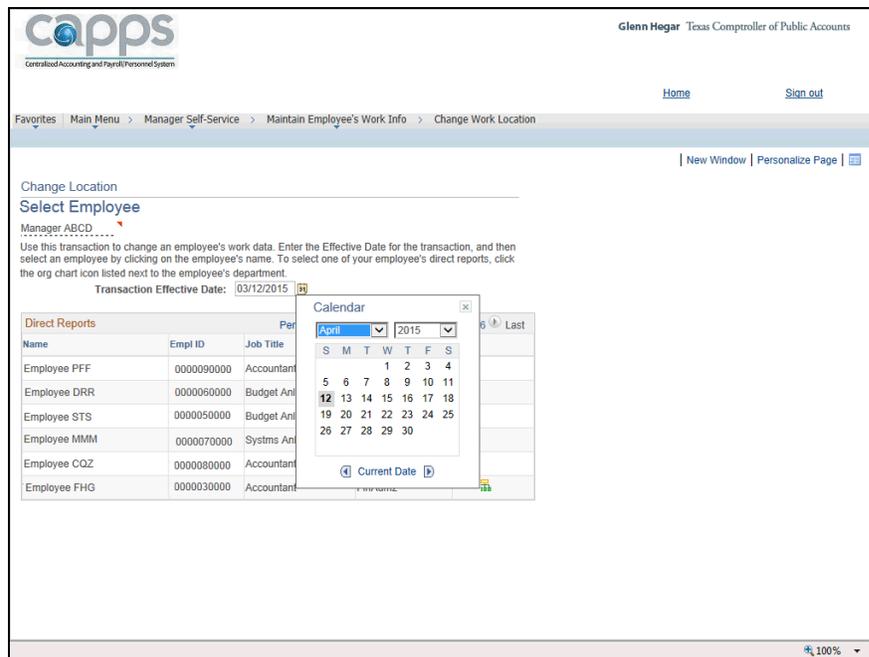
Direct Reports		
Name	Empl ID	Job Title
Employee PFF	0000090000	Accountant
Employee DRR	0000060000	Budget Anl
Employee STS	0000050000	Budget Anl
Employee MMM	0000070000	Systems Anl
Employee COZ	0000080000	Accountant
Employee FHG	0000030000	Accountant

Calendar: 2015

Month	Year
January	2015
February	2015
March	2015
April	2015
May	2015
June	2015
July	2015
August	2015
September	2015
October	2015
November	2015
December	2015

Current Date

Step	Action
6.	Click the April list item. April



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Home Sign out

Favorites Main Menu > Manager Self-Service > Maintain Employee's Work Info > Change Work Location

New Window Personalize Page

Change Location

Select Employee

Manager ABCD

Use this transaction to change an employee's work data. Enter the Effective Date for the transaction, and then select an employee by clicking on the employee's name. To select one of your employee's direct reports, click the org chart icon listed next to the employee's department.

Transaction Effective Date: 03/12/2015

Direct Reports		
Name	Empl ID	Job Title
Employee PFF	0000090000	Accountant
Employee DRR	0000060000	Budget Anl
Employee STS	0000050000	Budget Anl
Employee MMM	0000070000	Systems Anl
Employee COZ	0000080000	Accountant
Employee FHG	0000030000	Accountant

Calendar: 2015

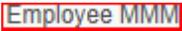
Month	Year
April	2015
May	2015
June	2015
July	2015
August	2015
September	2015
October	2015
November	2015
December	2015

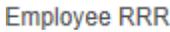
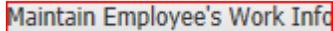
Current Date

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Step	Action
7.	Click the 1 link. 
8.	Choose the employee who is changing location. Click the Employee MMM link. 
9.	Click the Look up *New Location (Alt+5) button. 
10.	Click the 00002 link. 
11.	Mail Drop ID is not a required field. If there is a Mail Drop ID associated with the new location, it will show up in the lookup box. Click the Look up Mail Drop ID (Alt+5) button. 
12.	This location does not have a Mail Drop ID associated with it. Click the Cancel button. 
13.	Click the Submit button. 
14.	Click the OK button. 
15.	Once the manager submits the location change request, the location change is updated on Job and Position Data .
16.	Now that you have entered a change for your direct report, you also want to change the work location for one of your indirect reports. Click on the org chart icon for Employee FHG to drill down to your indirect reports. Click the Org Chart link. 

Step	Action
17.	<p>The new page shows a list of your indirect reports who report to Employee FHG.</p> <p>The employee you want to change is Employee RRR.</p> <p>Click the Employee RRR link.</p> 
18.	<p>The link takes you to the first page of the Change Work Location / Mail Drop process again.</p> <p>These pages are the same ones you used to process your direct report.</p> <p>The process is the same except for your choice of indirect report over direct report.</p>
19.	<p>Click the Maintain Employee's Work Info button.</p> 
20.	<p>2. Change an Employee's Reports To Manager</p> <p>Click the Change Reports To Manager menu.</p> 
21.	<p>Managers submit a reporting change request when there is a change in reporting structure.</p>
22.	<p>Enter the date on which the employee starts reporting to the new manager or supervisor.</p> <p>Click the Choose a date (Alt+5) button.</p> 
23.	<p>Click the button to the right of the field.</p> 

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Home Sign out

Favorites Main Menu > Manager Self-Service > Maintain Employee's Work Info > Change Reports To Manager

New Window Personalize Page

Change Reports To
Select Employee

Manager ABCD

Use this transaction to request a reporting change for one of your employees. Enter the effective date for the transaction, and then select an employee by clicking on the employee's name. To select one of your employee's direct reports, click the org chart icon listed next to the employee's department.

Transaction Effective Date: 03/12/2015

Direct Reports	Name	Empl ID	Job Title	Per
	Employee PFF	0000090000	Accountant	
	Employee DRR	0000060000	Budget Anl	
	Employee STS	0000050000	Budget Anl	
	Employee MMM	0000070000	Systems Anl	
	Employee CQZ	0000080000	Accountant	
	Employee FHG	0000030000	Accountant	

Calendar (2015)

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

Current Date

Step	Action
24.	Click the April list item. April

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Home Sign out

Favorites Main Menu > Manager Self-Service > Maintain Employee's Work Info > Change Reports To Manager

New Window Personalize Page

Change Reports To
Select Employee

Manager ABCD

Use this transaction to request a reporting change for one of your employees. Enter the effective date for the transaction, and then select an employee by clicking on the employee's name. To select one of your employee's direct reports, click the org chart icon listed next to the employee's department.

Transaction Effective Date: 03/12/2015

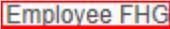
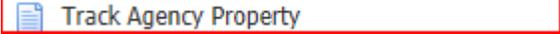
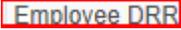
Direct Reports	Name	Empl ID	Job Title	Per
	Employee PFF	0000090000	Accountant	
	Employee DRR	0000060000	Budget Anl	
	Employee STS	0000050000	Budget Anl	
	Employee MMM	0000070000	Systems Anl	
	Employee CQZ	0000080000	Accountant	
	Employee FHG	0000030000	Accountant	

Calendar (2015)

April

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

Current Date

Step	Action
25.	Click the 1 link. 
26.	Choose the employee with the new manager or supervisor. Click the Employee FHG link. 
27.	Choose the new manager/supervisor's position number. Click the Position link. 
28.	Click the Submit button. 
29.	Click the OK button. 
30.	The system shows the date the change will take effect, along with the new supervisor's name and position number.
31.	Click the Manager Self-Service button. 
32.	3. Review or Enter Agency Property Note: Not all agencies will use this feature.
33.	Click the Track Agency Property menu. 
34.	Choose the employee who just received a new laptop. Click the Employee DRR link. 
35.	Enter the type of property received. Click the Look up Property (Alt+5) button. 
36.	Click the LAPTOP link. 

Step	Action
37.	Enter the date the laptop was issued to the employee. Click the Choose a date (Alt+5) button. 
38.	Click the 13 link. 
39.	Enter the desired information into the Serial Number field. Enter " TX5432680114 ". 
40.	Click the Save button. 
41.	Click the OK button. 
42.	The system now has a record of the laptop, as well as the date it was issued to the employee. If the employee receives a new laptop, or if the employee terminates, this laptop should be returned; the date of return would be entered in the Date Returned field.
43.	Congratulations! You have successfully completed this lesson. End of Procedure.

Section 5 - Compensation Management

Section 5 - Compensation Management

Award Merit Increase

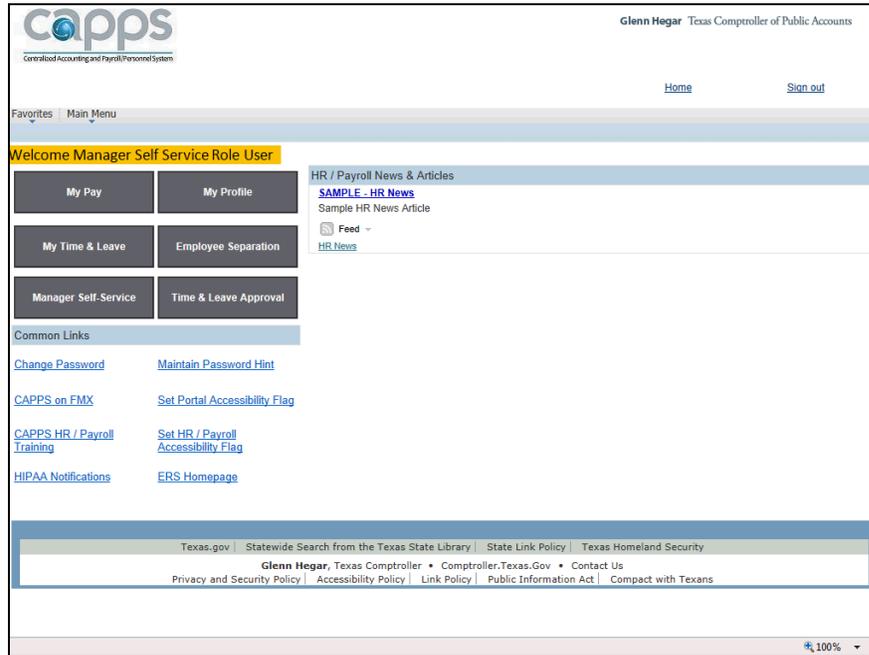
Section 5 - Lesson 1 Exercises - Award Merit Increase

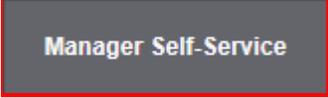
Procedure

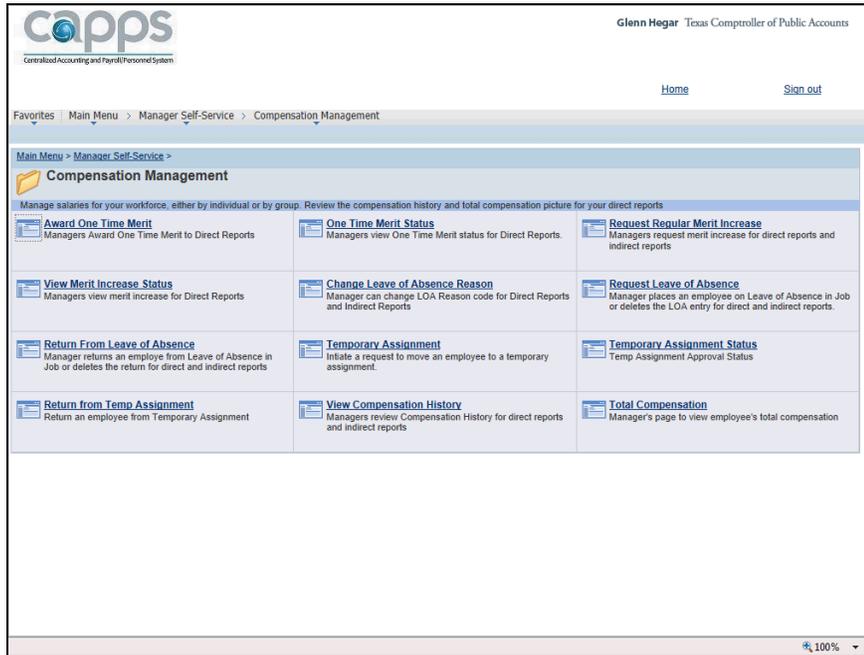
Managers can give their direct and indirect reports one-time merit awards and also regular merit awards.

This lesson explains how to process the award and then check on the status.

1. Award a One Time Merit
2. Request Regular Merit Increase
3. One Time Merit Status
4. View Merit Increase Status



Step	Action
1.	Click the Manager Self-Service button. 
2.	Click the Compensation Management link. 



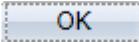
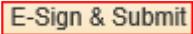
Step	Action
3.	<p>1. Award One Time Merit</p> <p>Click the Award One Time Merit link.</p> <p>Award One Time Merit</p>
4.	<p>Enter the date that the one time merit will be effective.</p> <p>Enter the desired information into the Transaction Effective Date field.</p> <p>Enter "04/01/2015".</p> <p><input type="text"/></p>
5.	<p>Enter the dollar amount for the merit award.</p> <p>Enter the desired information into the Amount field. Enter "1000.00".</p> <p><input type="text"/></p>
6.	<p>Note: When a dollar amount is entered in the Amount field, the system automatically calculates the Percent field.</p>

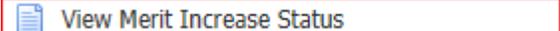
Step	Action
7.	<p>Enter an explanation for why the direct report is receiving the One Time Merit Increase.</p> <p>Enter "Employee's work was outstanding in the fourth quarter of 2014." into the Justification field.</p> <p>Justification:</p> <div data-bbox="440 590 1377 751" style="border: 1px solid red; height: 77px; width: 577px;"></div>
8.	<p>Click the Submit button.</p> <div data-bbox="440 814 583 848" style="border: 1px solid red; padding: 2px;">Submit</div>
9.	<p>The award request was successfully submitted.</p> <p>The originating manager and the approving manager are displayed on the submission.</p>
10.	<p>Click the OK button.</p> <div data-bbox="440 1062 505 1096" style="border: 1px solid red; padding: 2px;">OK</div>
11.	<p>2. Request Regular Merit Increase</p> <p>Click the Compensation Management menu.</p> <div data-bbox="440 1226 737 1260" style="border: 1px solid red; padding: 2px;">Compensation Management</div>
12.	<p>The manager requests a Regular Merit Increase.</p> <p>Click the Request Regular Merit Increase menu.</p> <div data-bbox="440 1396 1000 1430" style="border: 1px solid red; padding: 2px;">Request Regular Merit Increase</div>
13.	<p>Enter the date for the Regular Merit Increase to be effective.</p> <p>Enter the desired information into the Transaction Effective Date field. Enter "04/01/2015".</p> <div data-bbox="440 1598 578 1631" style="border: 1px solid gray; height: 16px; width: 85px;"></div>
14.	<p>Choose the employee who will receive the merit increase.</p> <p>Click the Employee DEX link.</p> <p>Employee DEX</p>

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Step	Action
15.	<p>A warning message displays to ensure that any changes made to the employee's pay be in compliance with agency policy.</p> <p>Click the OK button.</p> 
16.	<p>To change the employee's current salary amount, click on the Edit button and enter in the new information.</p> 
17.	<p>Enter the desired information into the Merit Percent field. Enter "2.0".</p> 
18.	<p>Enter the desired information into the Justification field.</p> <p>Enter "Employee's performance was excellent last year."</p> 
19.	<p>When a percent of the employee's current salary is entered, the system automatically calculates the new amount.</p> <p>Notice the Merit Amount has been calculated as well as the New Compensation Rate.</p> <p>Click the Return to Select Salary Component link.</p> 
20.	<p>The Salary Change Summary box lists the current salary, the change amount, the change percent and the new salary, all by year and month.</p>
21.	<p>Click the E-Sign & Submit button.</p> 
22.	<p>The request was successfully submitted and will be sent to the manager who initiated the request and the approving manager.</p>
23.	<p>Click the OK button.</p> 

Step	Action
24.	<p>3. One Time Merit Status</p> <p>Look at the One Time Merit Status to find the status of the first request.</p> <p>Click the One Time Merit Status link.</p> <p></p>
25.	<p>The One Time Merit Increase Status is still in a Submitted status. It is waiting for the proper person to approve it. If it is approved the Status will say Approved.</p>
26.	<p>Click the Compensation Management menu.</p> <p></p>
27.	<p>4. View Merit Increase Status</p> <p>Check on the second request, the Regular Merit Award.</p> <p>Click the View Merit Increase Status menu.</p> <p></p>
28.	<p>The Request Regular Merit Increase has been Approved and is ready to be added to the paycheck.</p>
29.	<p>Congratulations! You have successfully completed this lesson.</p> <p>End of Procedure.</p>

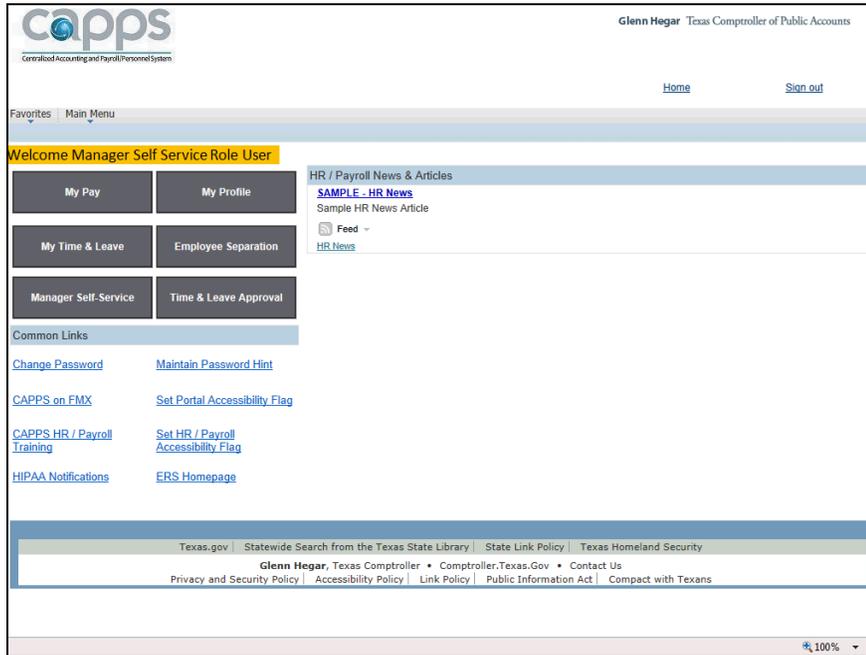
Leave of Absence

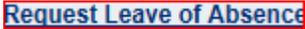
Section 5 - Lesson 2 Exercises - Leave of Absence

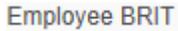
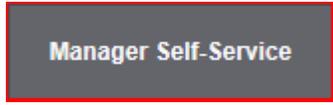
Procedure

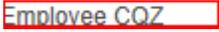
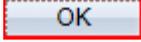
Managers can place their direct and indirect reports on a **Leave of Absence**, change the **Reason Code** for an employee already on Leave of Absence, and then **Return** an employee from Leave of Absence.

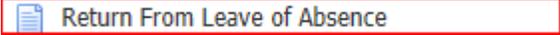
1. Request Leave of Absence
2. Change Leave of Absence Reason
3. Return from Leave of Absence

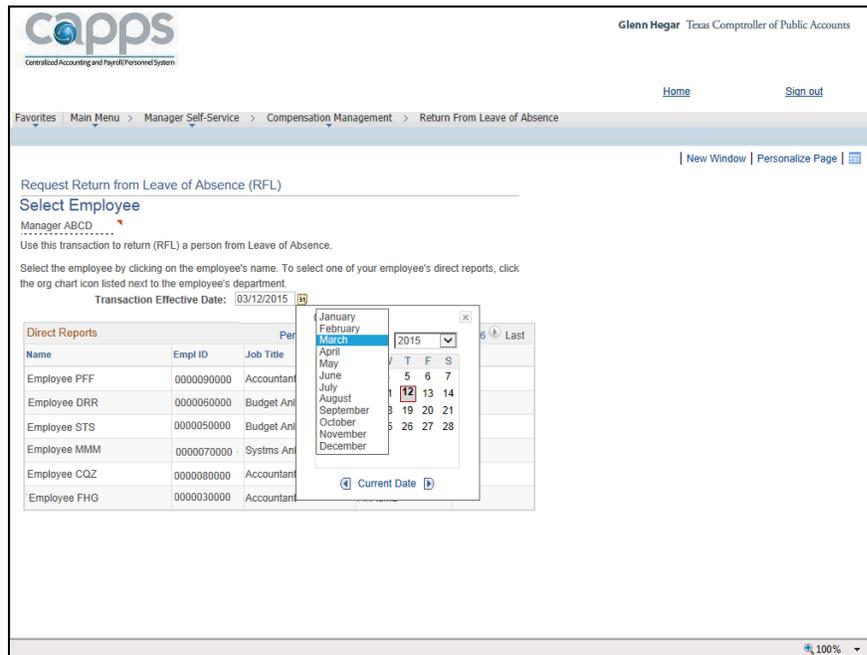


Step	Action
1.	<p>1. Request Leave of Absence</p> <p>Navigate to Request Leave of Absence</p> <p>Click the Manager Self-Service button.</p> 
2.	<p>Click the Compensation Management link.</p> 
3.	<p>Click the Request Leave of Absence link.</p> 
4.	<p>The Transaction Effective Date will be March 16, 2015.</p> <p>Click the Choose a date (Alt+5) button.</p> 
5.	<p>Click the 16 link.</p> 

Step	Action
6.	Choose the employee who will be going on Leave of Absence . Click the Employee BRIT link. 
7.	This is a regular Leave of Absence with no impact on the employee's FMLA. Click the Choose a date (Alt+5) button. 
8.	The *Leave of Absence Begin Date is March 16, 2015 date. Click the 16 link. 
9.	Click the Look up Description (Alt+5) button. 
10.	Choose the Leave, No Pay, Regular reason code. Click the 043 link. 
11.	Click the Submit button. 
12.	You have successfully placed the employee on a Leave of Absence .
13.	2. Change Leave of Absence Reason Navigate to the Change Leave of Absence Reason page. Click the Manager Self-Service button. 
14.	Click the Compensation Management link. 
15.	Click the Change Leave of Absence Reason link. 

Step	Action
16.	Choose an employee who is already on a leave of absence. Click the Employee CQZ link. 
17.	The employee has had a change in the reason for his Leave of Absence ; the reason change is effective on March 8.
18.	Click the Choose a date (Alt+5) button. 
19.	Select the date on which the absence reason change begins. Click the 8 link. 
20.	Choose the new absence reason. Click the Look up Description (Alt+5) button. 
21.	The employee is changing his Leave Reason to Leave, No Pay Parental . Click the Y43 link. 
22.	Because the Leave of Absence reason has changed to Parental , the manager must now contact an FMLA Administrator, who will update the employee's FMLA Plan.
23.	Click the Submit button. 
24.	Click the OK button. 
25.	You have successfully changed the employee's LOA reason code. Now you will enter a Return from Leave of Absence. Click the Compensation Management button. 
26.	3. Return from Leave of Absence The employee has notified his manager that he will be returning from Leave of Absence on April 1.

Step	Action
27.	Click the Return From Leave of Absence menu. 
28.	Enter the employee's return date into the Transaction Effective Date field. Click the Choose a date (Alt+5) button. 
29.	Click the button to the right of the field. 



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Home Sign out

Favorites | Main Menu > Manager Self-Service > Compensation Management > Return From Leave of Absence

New Window | Personalize Page

Request Return from Leave of Absence (RFL)

Select Employee

Manager ABCD

Use this transaction to return (RFL) a person from Leave of Absence.

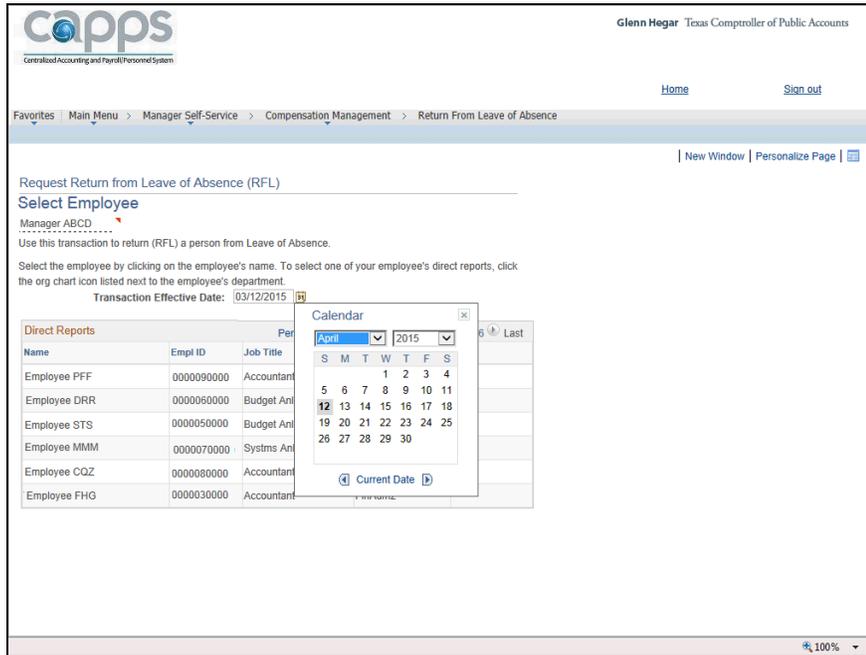
Select the employee by clicking on the employee's name. To select one of your employee's direct reports, click the org chart icon listed next to the employee's department.

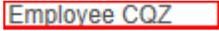
Transaction Effective Date: 03/12/2015

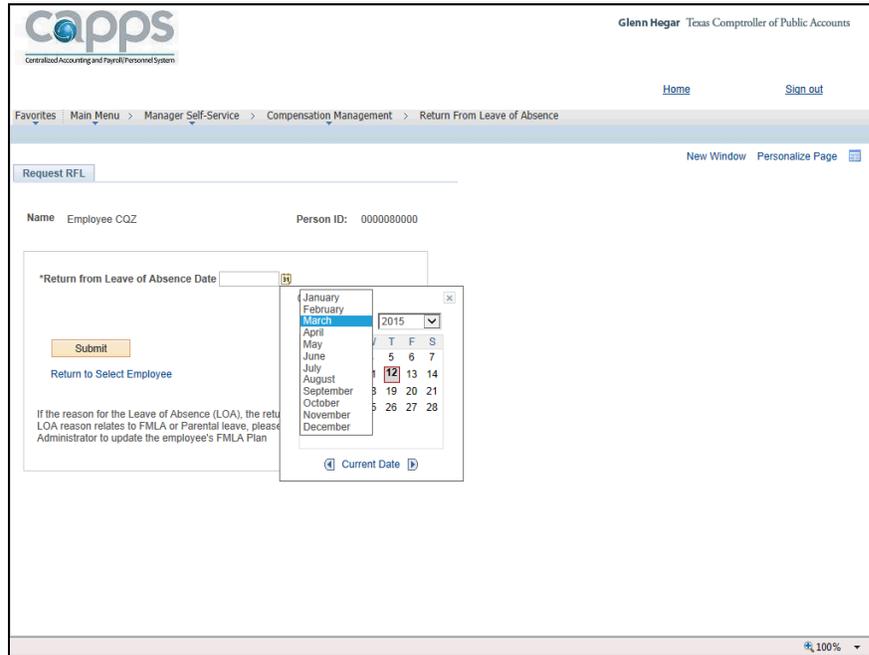
Direct Reports			Per
Name	Empl ID	Job Title	
Employee PFF	0000090000	Accountant	
Employee DRR	0000060000	Budget Anl	
Employee STS	0000050000	Budget Anl	
Employee MMM	0000070000	Systems An	
Employee CQZ	0000080000	Accountant	
Employee FHG	0000030000	Accountant	

100%

Step	Action
30.	Click the April list item. April



Step	Action
31.	Click the 1 link. 
32.	Choose the employee who is returning from leave. Click the Employee CQZ link. 
33.	Click the Choose a date (Alt+5) button. 
34.	Click the button to the right of the field. 



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Home Sign out

Favorites Main Menu > Manager Self-Service > Compensation Management > Return From Leave of Absence

Request RFL New Window Personalize Page

Name Employee CQZ Person ID: 0000080000

*Return from Leave of Absence Date

Submit

Return to Select Employee

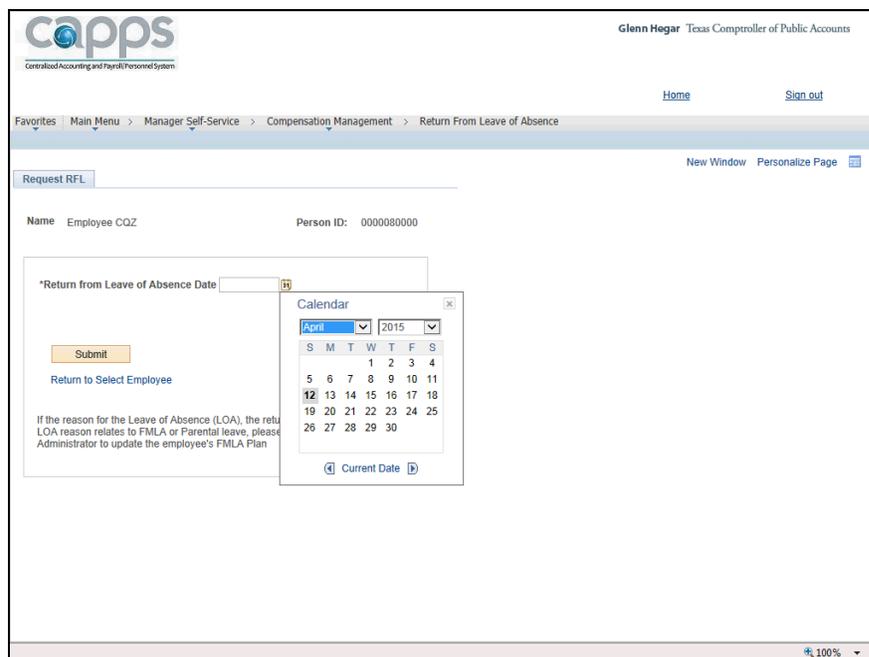
If the reason for the Leave of Absence (LOA), the return LOA reason relates to FMLA or Parental leave, please Administrator to update the employee's FMLA Plan

Calendar (2015)

	J	F	M	T	F	S
January						
February						
March						
April						
May						
June		5	6	7		
July		12	13	14		
August		19	20	21		
September						
October		26	27	28		
November						
December						

Current Date

Step	Action
35.	Click the April list item. April



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Home Sign out

Favorites Main Menu > Manager Self-Service > Compensation Management > Return From Leave of Absence

Request RFL New Window Personalize Page

Name Employee CQZ Person ID: 0000080000

*Return from Leave of Absence Date

Submit

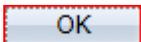
Return to Select Employee

If the reason for the Leave of Absence (LOA), the return LOA reason relates to FMLA or Parental leave, please Administrator to update the employee's FMLA Plan

Calendar (2015)

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

Current Date

Step	Action
36.	Click the 1 link. 
37.	Because the employee is on a Parental Leave of Absence , and will be returning to work on April 1, you must notify an FMLA Administrator, who will update the employee's FMLA Plan.
38.	Click the Submit button. 
39.	Click the OK button. 
40.	Congratulations! You have successfully completed this lesson. End of Procedure.

View Employee Compensation

Section 5 - Lesson 3 Exercises - View Employee Compensation

Procedure

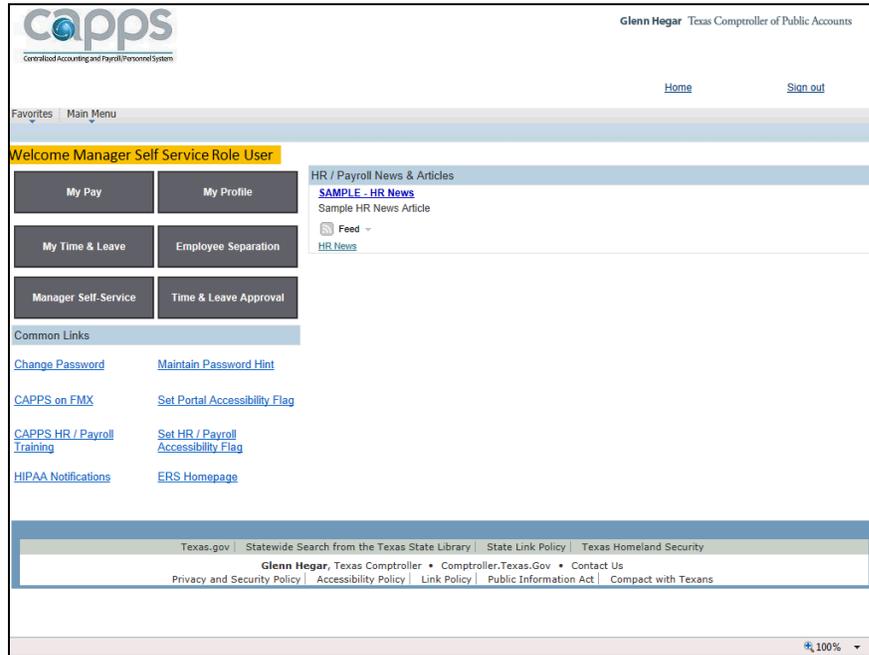
A manager may be required to view an employee's compensation history.

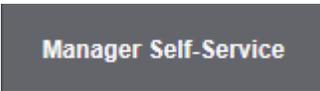
This lesson shows you the pages with this data.

1. View Total Compensation

2. View Total Compensation History

Step	Action
1.	View Compensation History Navigate to View Compensation History .



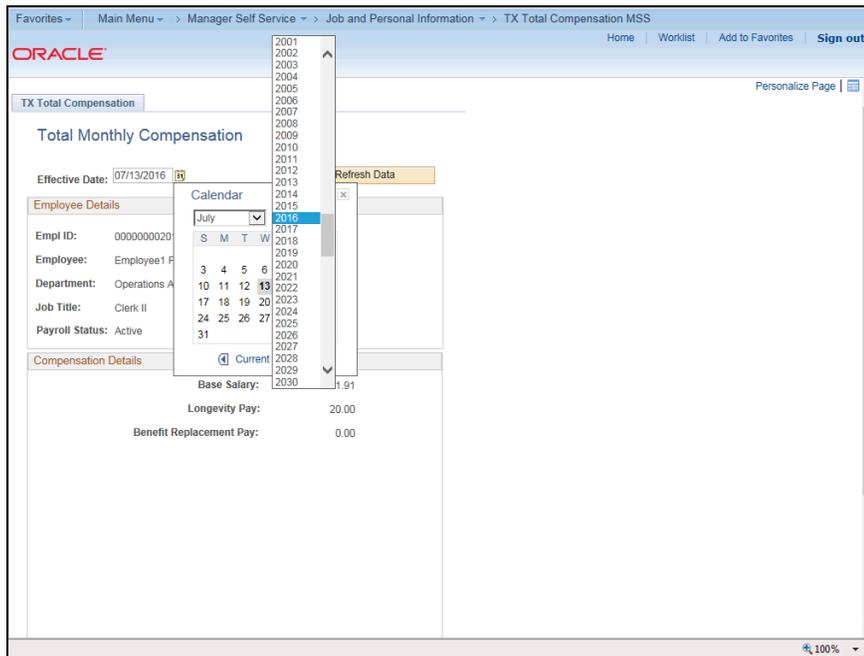
Step	Action
2.	Click the Manager Self Service link. 
3.	Click the Job and Personal Information link. 
4.	Click the TX Total Compensation MSS menu. 
5.	The TX Total Compensation MSS (Total Compensation) page enables the manager to select his direct reports to view the employees compensation details.
6.	Click the Employee1 Portal link. 
7.	The Total Monthly Compensation page displays the Employee Details and Compensation Details .
8.	This page shows Compensation details for the applicable effective date, i.e., Base Salary , Benefit Replacement Pay (BRP) , Longevity and/or Hazardous Duty , when applicable. Note: Amounts are based on eligibility and not actual employee compensation based on effective date.

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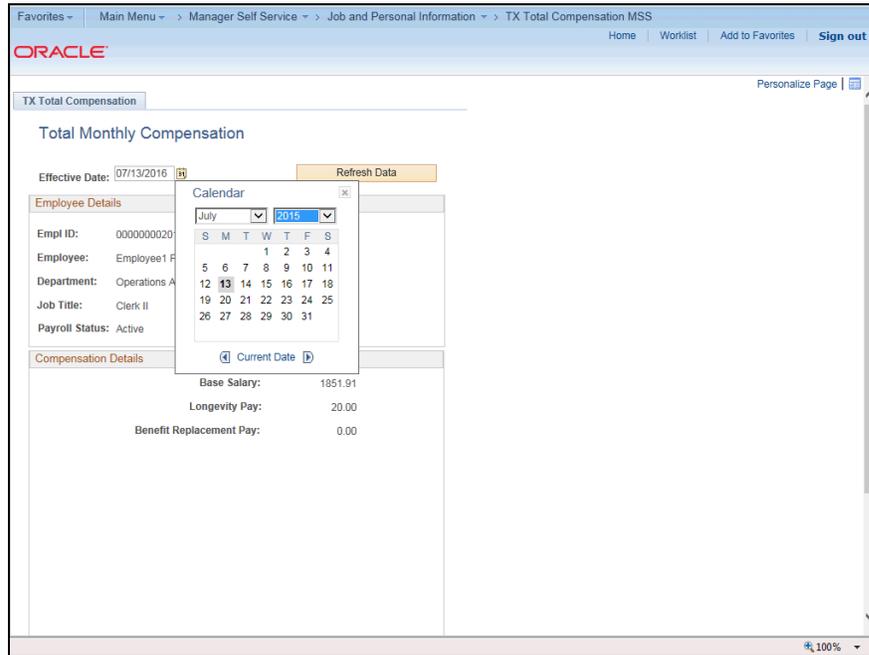
EUT Course

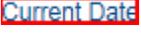
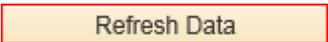


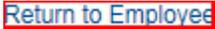
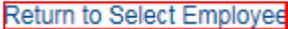
Step	Action
9.	The Effective Date defaults to the current date. Change this date to view the Compensation Details as of that date.
10.	In this example, you can view the Total Monthly Compensation for the same date of the prior year.
11.	Click the Choose a date (Alt+5) button. 
12.	Click the year list. 



Step	Action
13.	Click the 2015 list item. 



Step	Action
14.	Click the 13 link. 
15.	Click the Refresh Data button. 
16.	Notice the Base Salary has changed to reflect the compensation as of the Effective Date 07/13/2015 . Next, change the Effective Date back to the Current Date .
17.	Click the Choose a date (Alt+5) button. 
18.	Click the Current Date link. 
19.	Click the Refresh Data button. 
20.	Click the scroll bar.
21.	Please Note: The pay lines will only exist if they have a dollar amount greater than \$0.00 . They are currently listed for training purposes only.

Step	Action
22.	Click the Return to Employee link. 
23.	The manager also has the ability to view his direct reports Total Compensation History . Let's navigate to the Total Compensation History page.
24.	Click the Manager Self Service button. 
25.	Click the Compensation and Stock menu. 
26.	Click the TX Compensation History MSS menu. 
27.	The TX Compensation History MSS (Compensation History) displays the Direct Reports of the selected manager.
28.	Click the Employee1 Portal link. 
29.	The Salary History box shows Date of Change, Job Title, Company, Empl Status, Department, Action, Reason, Annual Salary and Compensation per Frequency of a manager's direct reports. The page also shows One Time Payments , as applicable.
30.	Click the Return to Select Employee link. 
31.	Click the Home link. 
32.	Congratulations! You have successfully completed this lesson. End of Procedure.

Temporary Assignment

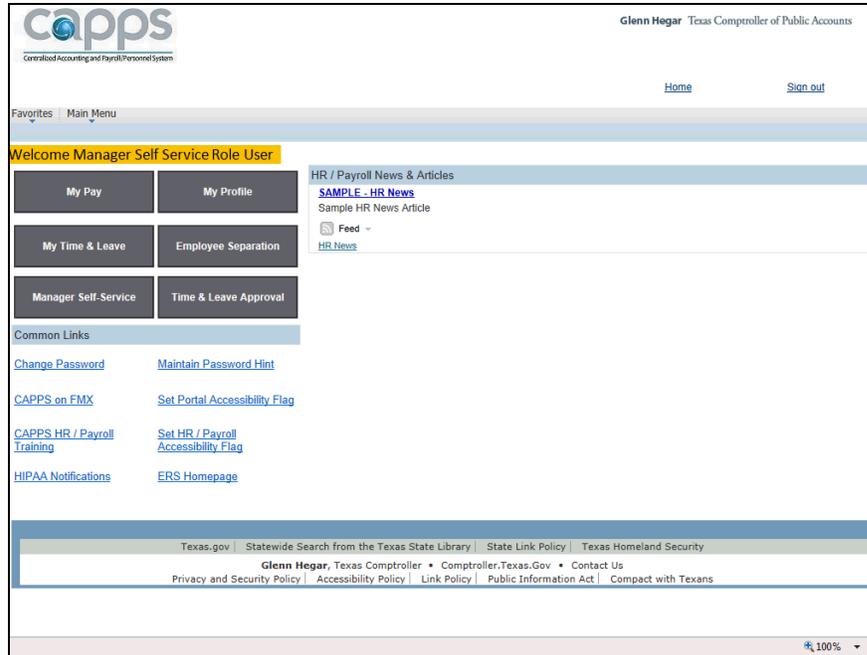
Section 5 - Lesson 4 Exercises - Temporary Assignments

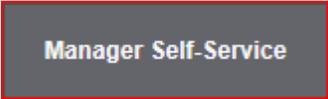
Procedure

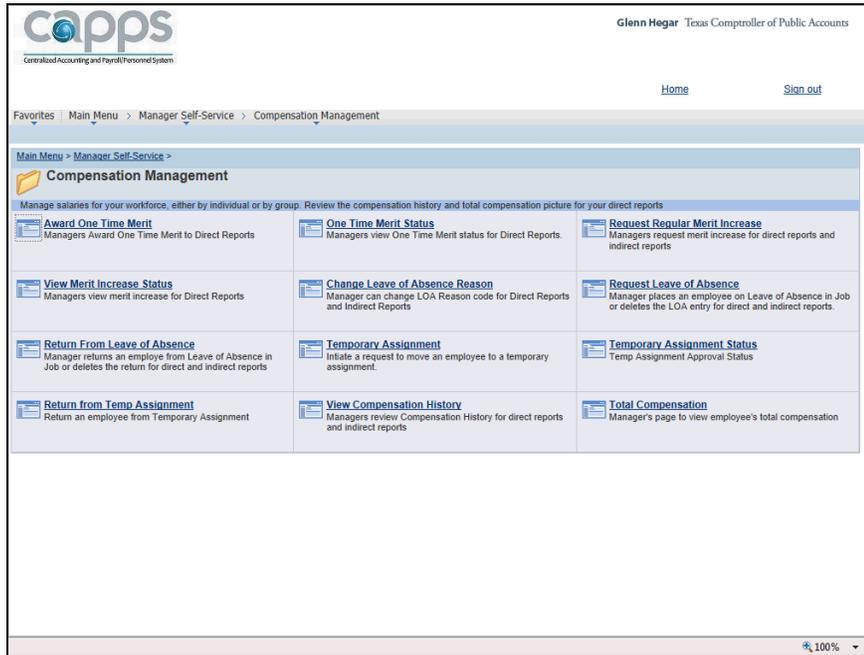
When a manager's direct report accepts a **Temporary Assignment**, the manager changes the employee's assignment.

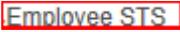
In this lesson, the manager will place an employee on a **Temporary Assignment**, and make adjustments to their compensation.

1. Temporary Assignment
2. Temporary Assignment Status
3. Return from Temporary Assignment

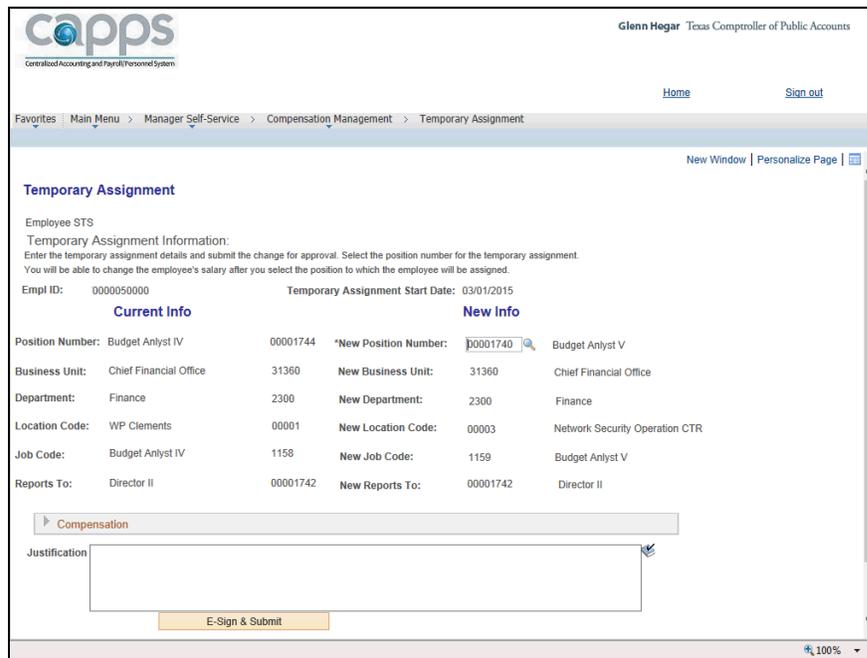


Step	Action
1.	<p>1. Temporary Assignment</p> <p>Navigate to Temporary Assignment.</p> <p>Click the Manager Self-Service button.</p> 



Step	Action
2.	Click the Temporary Assignment link. 
3.	The Transaction Effective Date is also the date on which the employee begins the Temporary Assignment : March 1, 2015. Click the Choose a date (Alt+5) button. 
4.	Click the 1 link. 
5.	Choose the employee going on Temporary Assignment . Click the Employee STS link. 
6.	Choose the New Position Number for this Temporary Assignment . Click the Look up New Position Number (Alt+5) button. 

Step	Action
7.	<p>The employee's new position will be Budget Analyst V.</p> <p>Click the 00001740 link.</p> <p>00001740</p>



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Home Sign out

Favorites Main Menu > Manager Self-Service > Compensation Management > Temporary Assignment

New Window | Personalize Page

Temporary Assignment

Employee STS

Temporary Assignment Information:
Enter the temporary assignment details and submit the change for approval. Select the position number for the temporary assignment.
You will be able to change the employee's salary after you select the position to which the employee will be assigned.

Empl ID: 000050000 Temporary Assignment Start Date: 03/01/2015

Current Info		New Info	
Position Number:	Budget Analyst IV 00001744	*New Position Number:	00001740 Budget Analyst V
Business Unit:	Chief Financial Office 31360	New Business Unit:	31360 Chief Financial Office
Department:	Finance 2300	New Department:	2300 Finance
Location Code:	WP Clements 00001	New Location Code:	00003 Network Security Operation CTR
Job Code:	Budget Analyst IV 1158	New Job Code:	1159 Budget Analyst V
Reports To:	Director II 00001742	New Reports To:	00001742 Director II

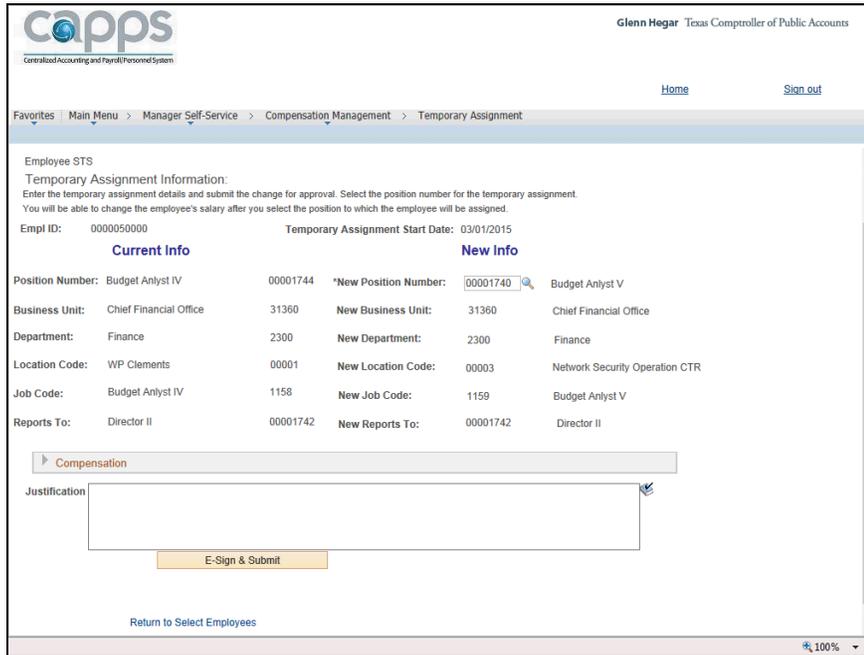
Compensation

Justification

E-Sign & Submit

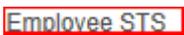
100%

Step	Action
8.	Click the Vertical Scrollbar to scroll down the page.



Step	Action
9.	<p>You have selected the New Position Number for this Temporary Assignment. Now you have to adjust the Compensation.</p> <p>Click the Expand section button.</p> 
10.	<p>Click the Vertical Scrollbar to scroll down the page.</p>
11.	<p>New Compensation can be changed by percentage or by amount. In this example, you will increase the Base Salary by 10%.</p> <p>Enter the desired information into the Change Percent field. Enter "10".</p> <input data-bbox="342 1438 456 1476" type="text"/>
12.	<p>Click the Calculate Balance button.</p> 
13.	<p>The system displays the calculated Change Amount, and the New Compensation amount.</p>

Step	Action
14.	<p>You must enter a Justification in order for this change to process correctly. Enter a reason for this change.</p> <p>Enter the desired information into the Justification field. Enter "Test".</p> <div data-bbox="440 499 1377 615" style="border: 1px solid black; height: 55px; width: 100%;"></div>
15.	<p>When you E-Sign & Submit this change, the system will submit the employee's Compensation change for Approval.</p> <p>Click the E-Sign & Submit button.</p> <div data-bbox="440 772 831 814" style="border: 1px solid red; padding: 2px; display: inline-block;">E-Sign & Submit</div>
16.	<p>The employee's Temporary Assignment has been submitted for Approval.</p> <p>Click the OK button.</p> <div data-bbox="440 940 599 982" style="border: 1px solid red; padding: 2px; display: inline-block;">OK</div>
17.	<p>2. Temporary Assignment Status</p> <p>Review the status of the Temporary Assignment request.</p> <p>Click the Compensation Management menu.</p> <div data-bbox="440 1176 735 1218" style="border: 1px solid red; padding: 2px; display: inline-block;">Compensation Management</div>
18.	<p>Click the Temporary Assignment Status menu item.</p> <div data-bbox="440 1276 1000 1318" style="border: 1px solid red; padding: 2px; display: inline-block;">Temporary Assignment Status</div>
19.	<p>The Temporary Assignment Request Status = Submitted; it is waiting for Approval.</p>
20.	<p>Click the Compensation Management menu.</p> <div data-bbox="440 1423 735 1465" style="border: 1px solid red; padding: 2px; display: inline-block;">Compensation Management</div>
21.	<p>3. Return from Temporary Assignment</p> <p>The employee will return from Temporary Assignment on April 1, 2015.</p> <p>Click the Return from Temp Assignment menu item.</p> <div data-bbox="440 1659 1000 1701" style="border: 1px solid red; padding: 2px; display: inline-block;">Return from Temp Assignment</div>
22.	<p>Click the Choose a date (Alt+5) button.</p> <div data-bbox="440 1764 472 1801" style="border: 1px solid red; padding: 2px; display: inline-block;">31</div>

Step	Action
23.	Click the 1 link. 
24.	Choose the employee to return from Temporary Assignment . Click the Employee STS link. 
25.	Click the E-Sign and Approve link. 
26.	The employee's return from Temporary Assignment is now approved.
27.	Congratulations! You have successfully completed this lesson. End of Procedure.

Section 6 - Separations and Lump Sum Payments

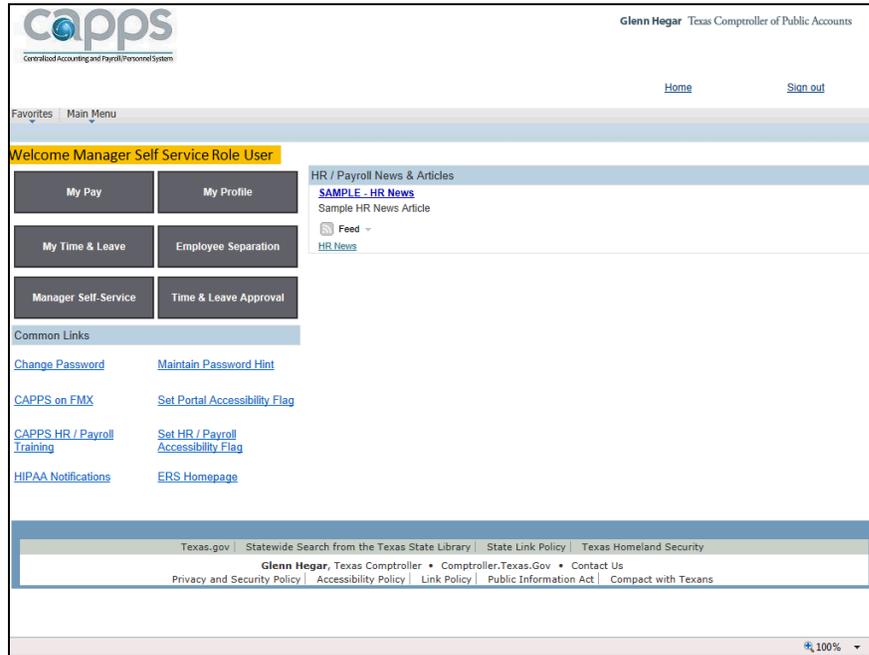
Section 6 - Separations and Lump Sum Payments

Voluntary Separation

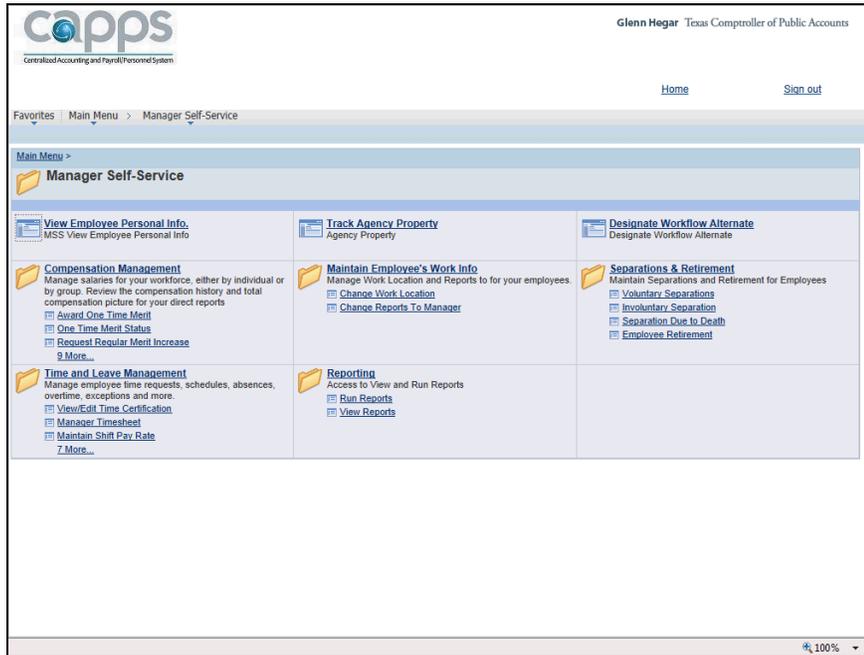
Section 6 - Lesson 1 Exercises - Voluntary Separation

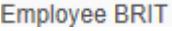
Procedure

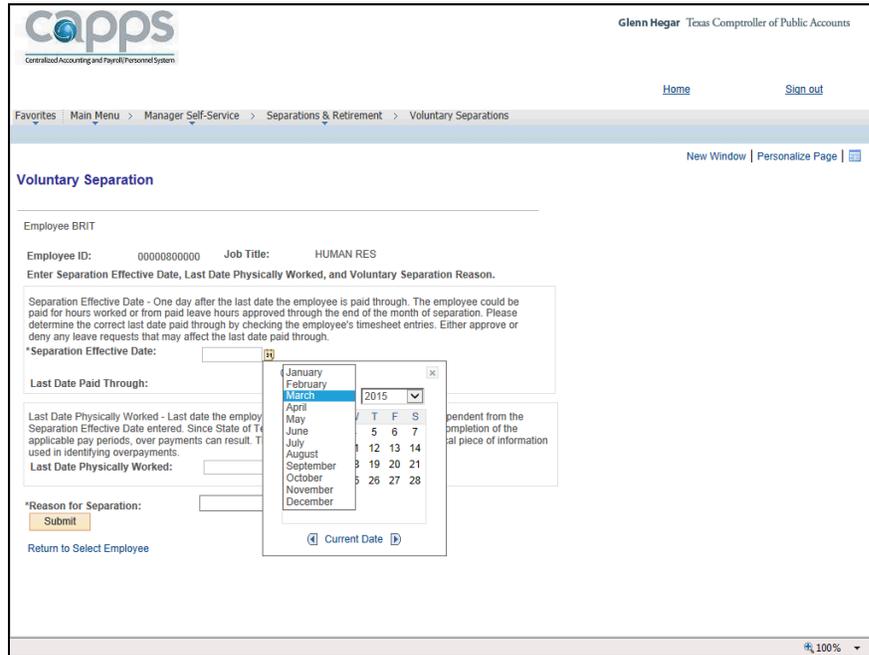
Voluntary Separation is the separation filed by an employee when the employee willingly initiates termination of service with an Agency.



Step	Action
1.	<p>Navigate to the Voluntary Separation page.</p> <p>Click the Manager Self-Service button.</p> <div data-bbox="440 1157 768 1255" style="border: 2px solid red; padding: 5px; text-align: center; background-color: #444; color: white; margin: 10px auto; width: fit-content;"> Manager Self-Service </div>



Step	Action
2.	Click the Separations & Retirement link. 
3.	Click the Voluntary Separations link. 
4.	Choose the employee with the Voluntary Separation . Click the Employee BRIT link. 
5.	The *Separation Effective Date is one day after the last date through which the employee is paid. For example, if the employee is paid through April 15, then the *Separation Effective Date would be April 16. Click the Choose a date (Alt+5) button. 
6.	Click the button to the right of the field. 



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Home Sign out

Favorites Main Menu > Manager Self-Service > Separations & Retirement > Voluntary Separations

New Window | Personalize Page

Voluntary Separation

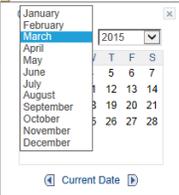
Employee BRIT

Employee ID: 0000800000 Job Title: HUMAN RES

Enter Separation Effective Date, Last Date Physically Worked, and Voluntary Separation Reason.

Separation Effective Date - One day after the last date the employee is paid through. The employee could be paid for hours worked or from paid leave hours approved through the end of the month of separation. Please determine the correct last date paid through by checking the employee's timesheet entries. Either approve or deny any leave requests that may affect the last date paid through.

*Separation Effective Date:

Last Date Paid Through: 

Last Date Physically Worked - Last date the employee Separation Effective Date entered. Since State of TX applicable pay periods, over payments can result. T used in identifying overpayments.

Last Date Physically Worked:

*Reason for Separation:

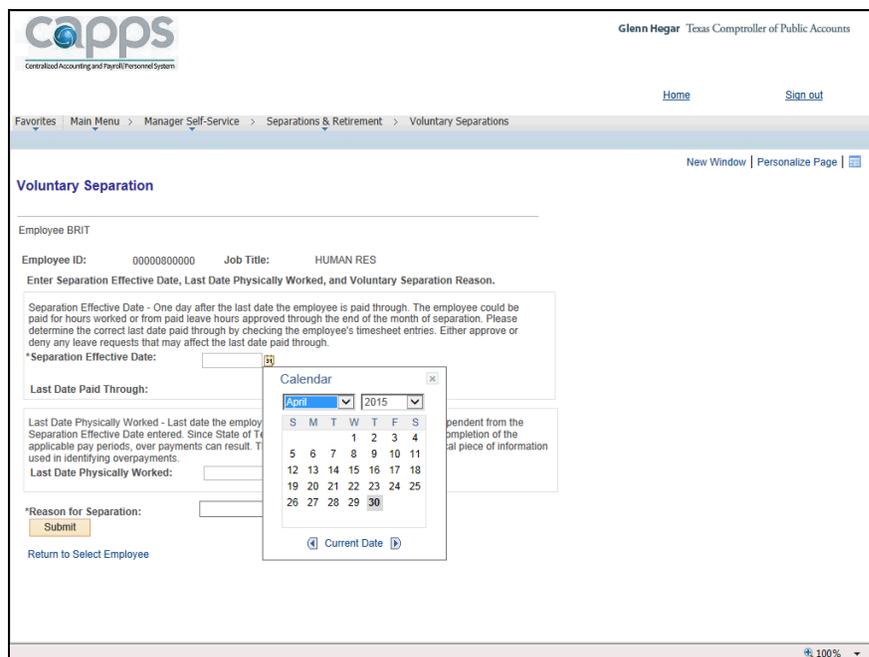
Submit

Return to Select Employee

pendent from the completion of the al piece of information

100%

Step	Action
7.	Click the April list item.



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Home Sign out

Favorites Main Menu > Manager Self-Service > Separations & Retirement > Voluntary Separations

New Window | Personalize Page

Voluntary Separation

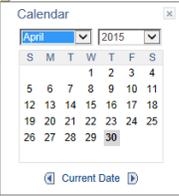
Employee BRIT

Employee ID: 0000800000 Job Title: HUMAN RES

Enter Separation Effective Date, Last Date Physically Worked, and Voluntary Separation Reason.

Separation Effective Date - One day after the last date the employee is paid through. The employee could be paid for hours worked or from paid leave hours approved through the end of the month of separation. Please determine the correct last date paid through by checking the employee's timesheet entries. Either approve or deny any leave requests that may affect the last date paid through.

*Separation Effective Date:

Last Date Paid Through: 

Last Date Physically Worked - Last date the employee Separation Effective Date entered. Since State of TX applicable pay periods, over payments can result. T used in identifying overpayments.

Last Date Physically Worked:

*Reason for Separation:

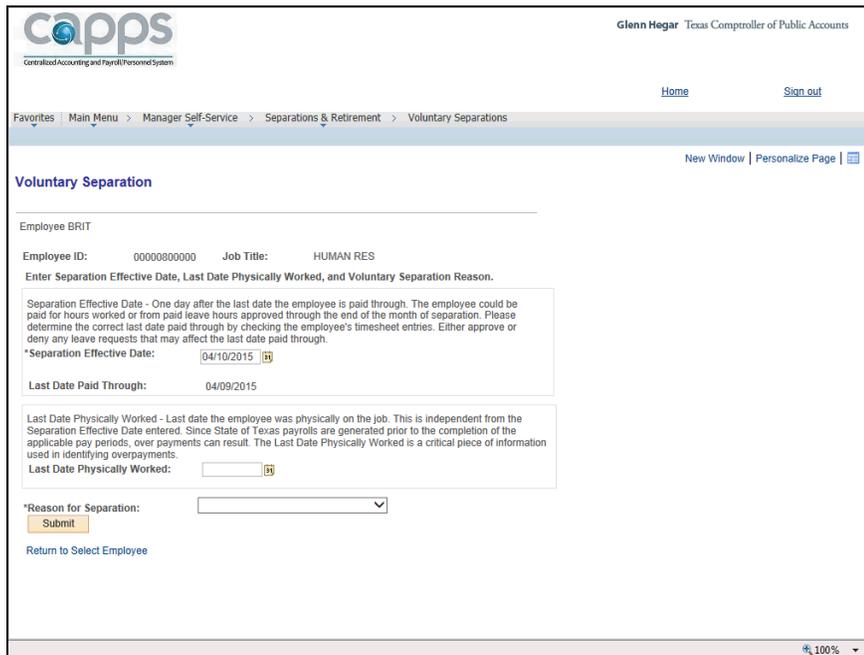
Submit

Return to Select Employee

pendent from the completion of the al piece of information

100%

Step	Action
8.	<p>In this example, the employee is paid through April 9, so select April 10 as the *Separation Effective Date.</p> <p>Click the 10 link.</p> <p>10</p>



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Home Sign out

Favorites Main Menu > Manager Self-Service > Separations & Retirement > Voluntary Separations

New Window | Personalize Page

Voluntary Separation

Employee BRIT

Employee ID: 0000080000 Job Title: HUMAN RES

Enter Separation Effective Date, Last Date Physically Worked, and Voluntary Separation Reason.

Separation Effective Date - One day after the last date the employee is paid through. The employee could be paid for hours worked or from paid leave hours approved through the end of the month of separation. Please determine the correct last date paid through by checking the employee's timesheet entries. Either approve or deny any leave requests that may affect the last date paid through.

*Separation Effective Date: 04/10/2015

Last Date Paid Through: 04/09/2015

Last Date Physically Worked - Last date the employee was physically on the job. This is independent from the Separation Effective Date entered. Since State of Texas payrolls are generated prior to the completion of the applicable pay periods, over payments can result. The Last Date Physically Worked is a critical piece of information used in identifying overpayments.

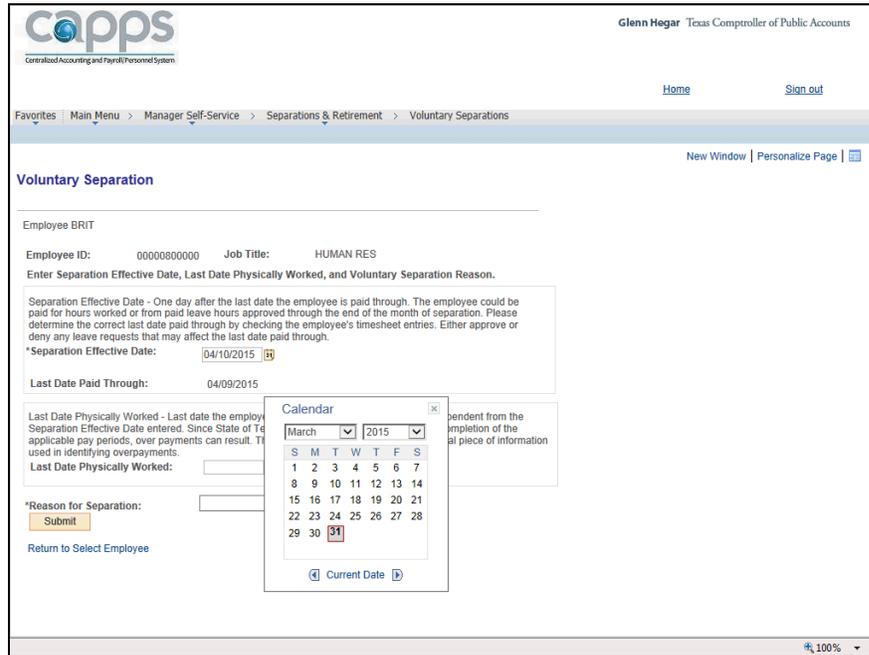
Last Date Physically Worked:

*Reason for Separation:

[Return to Select Employee](#)

100%

Step	Action
9.	<p>Click Choose a date (Alt+5) button.</p> <p>31</p>



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Home Sign out

Favorites Main Menu > Manager Self-Service > Separations & Retirement > Voluntary Separations

New Window | Personalize Page

Voluntary Separation

Employee BRIT

Employee ID: 00000800000 Job Title: HUMAN RES

Enter Separation Effective Date, Last Date Physically Worked, and Voluntary Separation Reason.

Separation Effective Date - One day after the last date the employee is paid through. The employee could be paid for hours worked or from paid leave hours approved through the end of the month of separation. Please determine the correct last date paid through by checking the employee's timesheet entries. Either approve or deny any leave requests that may affect the last date paid through.

*Separation Effective Date: 04/10/2015

Last Date Paid Through: 04/09/2015

Last Date Physically Worked - Last date the employee worked before the Separation Effective Date entered. Since State of Texas pay periods, over payments can result. This date is used in identifying overpayments.

Last Date Physically Worked:

*Reason for Separation:

Submit

Return to Select Employee

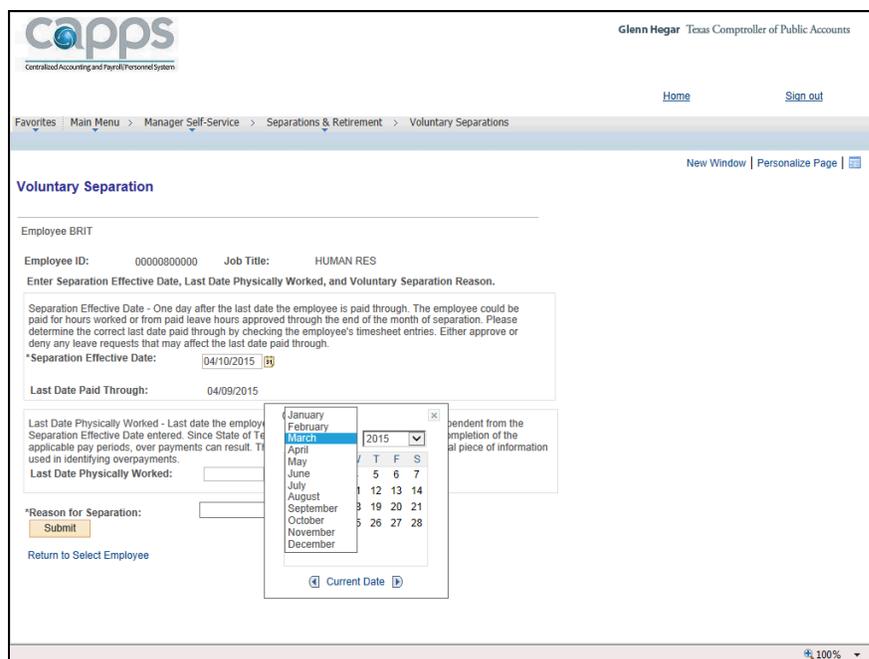
Calendar

March 2015

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

Current Date

Step	Action
10.	Click the button to the right of the field.

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Home Sign out

Favorites Main Menu > Manager Self-Service > Separations & Retirement > Voluntary Separations

New Window | Personalize Page

Voluntary Separation

Employee BRIT

Employee ID: 00000800000 Job Title: HUMAN RES

Enter Separation Effective Date, Last Date Physically Worked, and Voluntary Separation Reason.

Separation Effective Date - One day after the last date the employee is paid through. The employee could be paid for hours worked or from paid leave hours approved through the end of the month of separation. Please determine the correct last date paid through by checking the employee's timesheet entries. Either approve or deny any leave requests that may affect the last date paid through.

*Separation Effective Date: 04/10/2015

Last Date Paid Through: 04/09/2015

Last Date Physically Worked - Last date the employee worked before the Separation Effective Date entered. Since State of Texas pay periods, over payments can result. This date is used in identifying overpayments.

Last Date Physically Worked:

*Reason for Separation:

Submit

Return to Select Employee

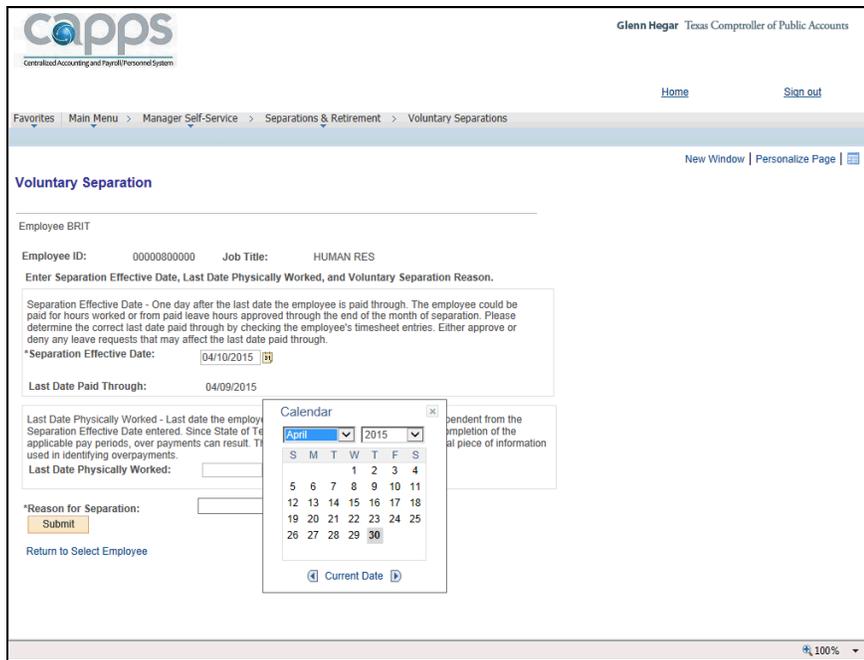
Month Selection

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

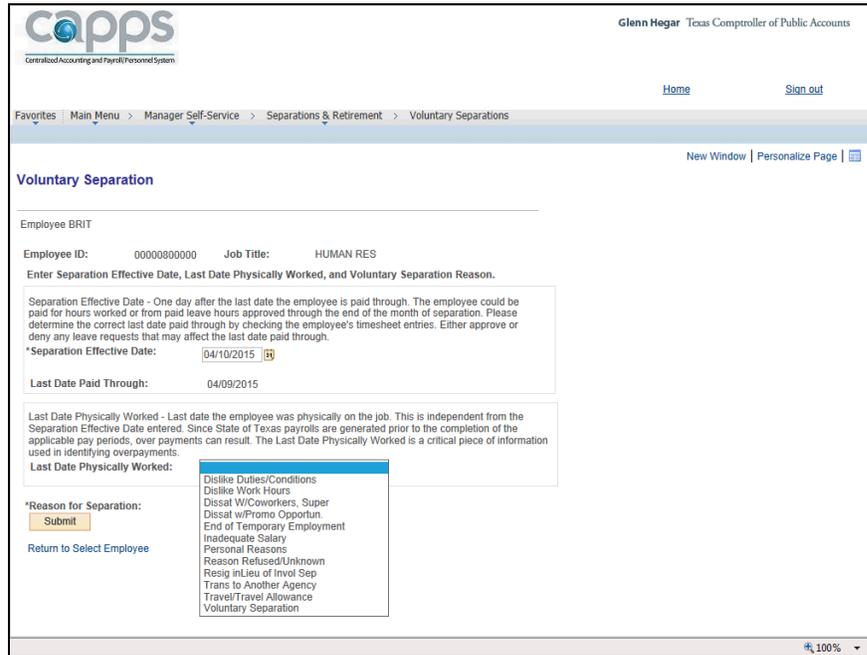
2015

Current Date

Step	Action
11.	Click the April list item. April



Step	Action
12.	April 8 is the last day the employee physically worked. Click the 8 link. 8
13.	Click the Reason for Separation list. Reason for Separation



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Home Sign out

Favorites Main Menu > Manager Self-Service > Separations & Retirement > Voluntary Separations

New Window | Personalize Page

Voluntary Separation

Employee BRIT

Employee ID: 0000080000 Job Title: HUMAN RES

Enter Separation Effective Date, Last Date Physically Worked, and Voluntary Separation Reason.

Separation Effective Date - One day after the last date the employee is paid through. The employee could be paid for hours worked or from paid leave hours approved through the end of the month of separation. Please determine the correct last date paid through by checking the employee's timesheet entries. Either approve or deny any leave requests that may affect the last date paid through.

*Separation Effective Date: 04/10/2015

Last Date Paid Through: 04/09/2015

Last Date Physically Worked - Last date the employee was physically on the job. This is independent from the Separation Effective Date entered. Since State of Texas payrolls are generated prior to the completion of the applicable pay periods, over payments can result. The Last Date Physically Worked is a critical piece of information used in identifying overpayments.

Last Date Physically Worked:

- Dislike Duties/Conditions
- Dislike Work Hours
- Dissat w/Coworkers, Super
- Dissat w/Promo Opportun.
- End of Temporary Employment
- Inadequate Salary
- Personal Reasons
- Reason Refused/Unknown
- Resig in/Lieu of Invol Sep
- Trans to Another Agency
- Travel/Travel Allowance
- Voluntary Separation

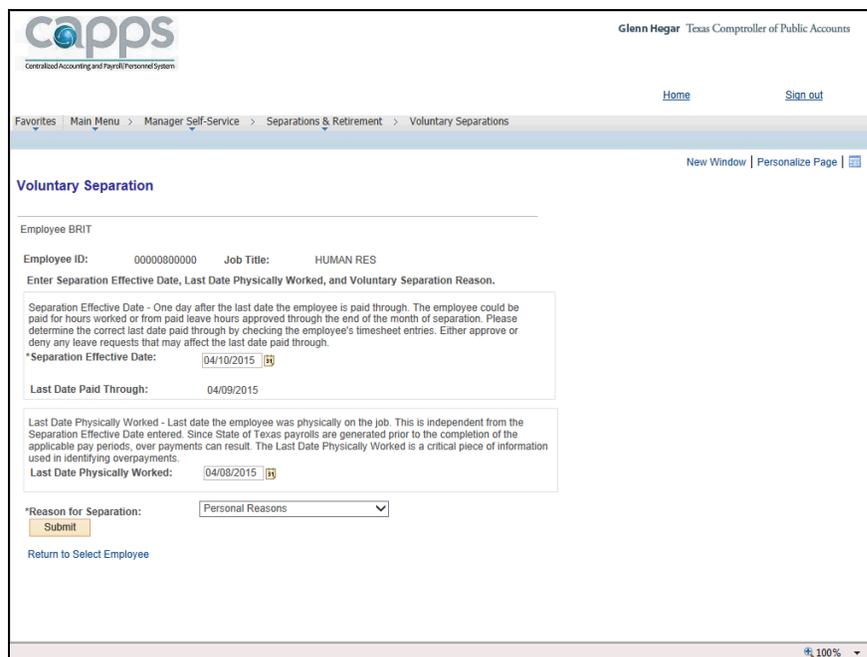
*Reason for Separation:

Submit

Return to Select Employee

100%

Step	Action
14.	Click the Personal Reasons list item.
	Personal Reasons



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Home Sign out

Favorites Main Menu > Manager Self-Service > Separations & Retirement > Voluntary Separations

New Window | Personalize Page

Voluntary Separation

Employee BRIT

Employee ID: 0000080000 Job Title: HUMAN RES

Enter Separation Effective Date, Last Date Physically Worked, and Voluntary Separation Reason.

Separation Effective Date - One day after the last date the employee is paid through. The employee could be paid for hours worked or from paid leave hours approved through the end of the month of separation. Please determine the correct last date paid through by checking the employee's timesheet entries. Either approve or deny any leave requests that may affect the last date paid through.

*Separation Effective Date: 04/10/2015

Last Date Paid Through: 04/09/2015

Last Date Physically Worked - Last date the employee was physically on the job. This is independent from the Separation Effective Date entered. Since State of Texas payrolls are generated prior to the completion of the applicable pay periods, over payments can result. The Last Date Physically Worked is a critical piece of information used in identifying overpayments.

Last Date Physically Worked: 04/08/2015

*Reason for Separation: Personal Reasons

Submit

Return to Select Employee

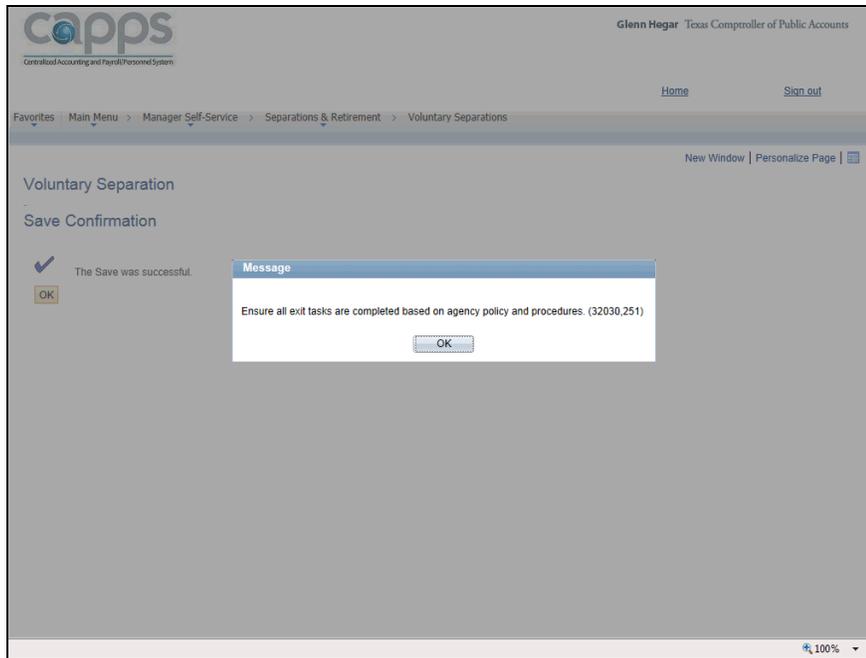
100%

CAPPS HR/PAYROLL

EUT Course



Step	Action
15.	Click the Submit link. 



Step	Action
16.	A Terminated Employee is paid Lump Sum Vacation (if any) after the employee has been off payroll for 30 days; this payment will be processed on the next available payroll. Managers are responsible for zeroing out any remaining leave balances, according to their agency's rules. Click the OK button. 
17.	Click the OK button. 
18.	An email will be automatically generated if a manager does not enter a separation in a timely manner.

Step	Action
19.	<p>The email will have this text:</p> <p>You have an employee(s) who has submitted a separation request that has not been processed and may impact the upcoming payroll. A listing of your unprocessed employee separation request(s) is provided below.</p> <p>Please process the separation(s) in Manager Self Service prior to the current payroll period deadline stated in the subject line of this email.</p> <p>If any of the listed separations affect a prior pay period, please approve any leave requests and enter the separation effective date immediately. If the separation effective date is over 30 days in the past, please contact your agency's HR administrator.</p> <p>If you have been in contact with your employee and have agreed not to go forward with the separation entry, then no action related to that separation request is necessary.</p> <p>If you need assistance, please contact Employee AAA at first.last@agy.texas.gov.</p>
20.	<p>Congratulations! You have successfully completed this lesson. End of Procedure.</p>

Involuntary Separation

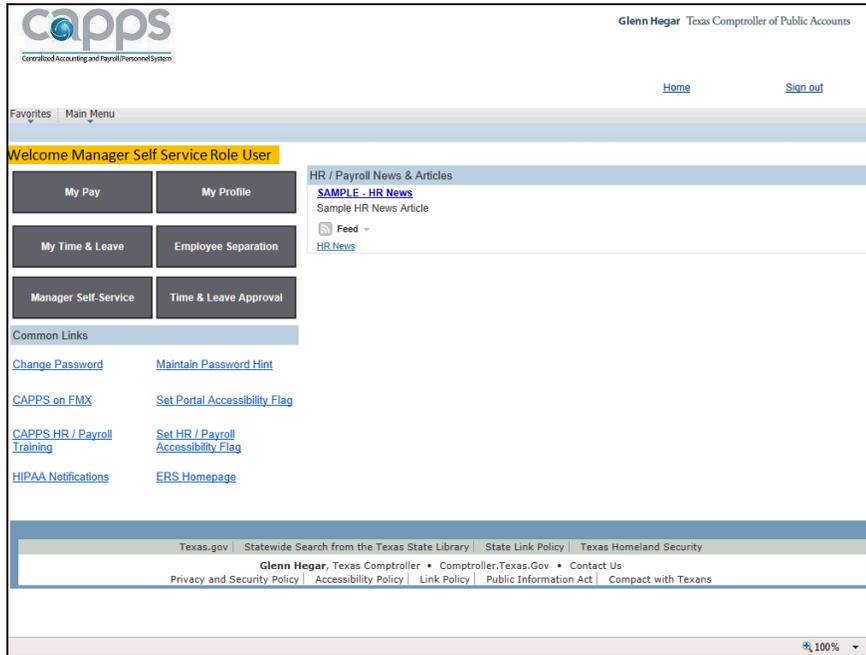
Section 6 - Lesson 2 Exercises - Involuntary Separation

Procedure

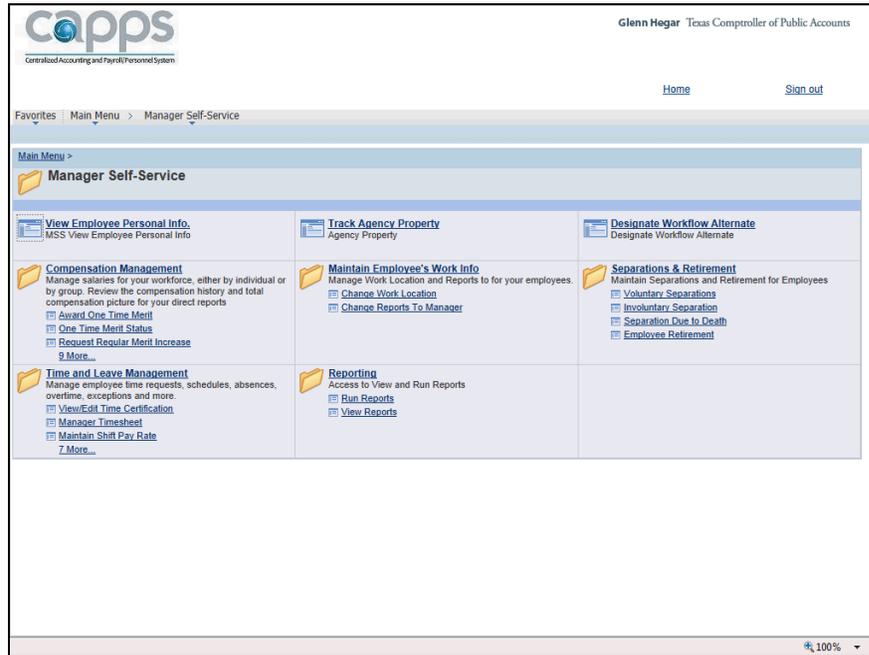
Involuntary Separation occurs when the department chooses to separate employees through reduction in force, or by termination for conduct reasons.

CAPPS HR/PAYROLL

EUT Course



Step	Action
1.	<p>Navigate to the Involuntary Separation page.</p> <p>Click the Manager Self-Service button.</p> <div data-bbox="345 1157 672 1255" style="border: 2px solid red; padding: 5px; text-align: center; background-color: #444; color: white; width: fit-content; margin: 0 auto;"> Manager Self-Service </div>



Step	Action
2.	Click the Separations & Retirement link. Separations & Retirement
3.	Click the Involuntary Separation link. Involuntary Separation
4.	Choose the employee who will be involuntarily separated. Click the Employee LLOO link. Employee LLOO
5.	Enter the *Separation Effective Date . Click the Choose a date (Alt+5) button. 31
6.	The employee will be paid through April 17; that means the *Separation Effective Date is April 18. Click the 18 link. 18
7.	Click the Choose a date (Alt+5) button. 31

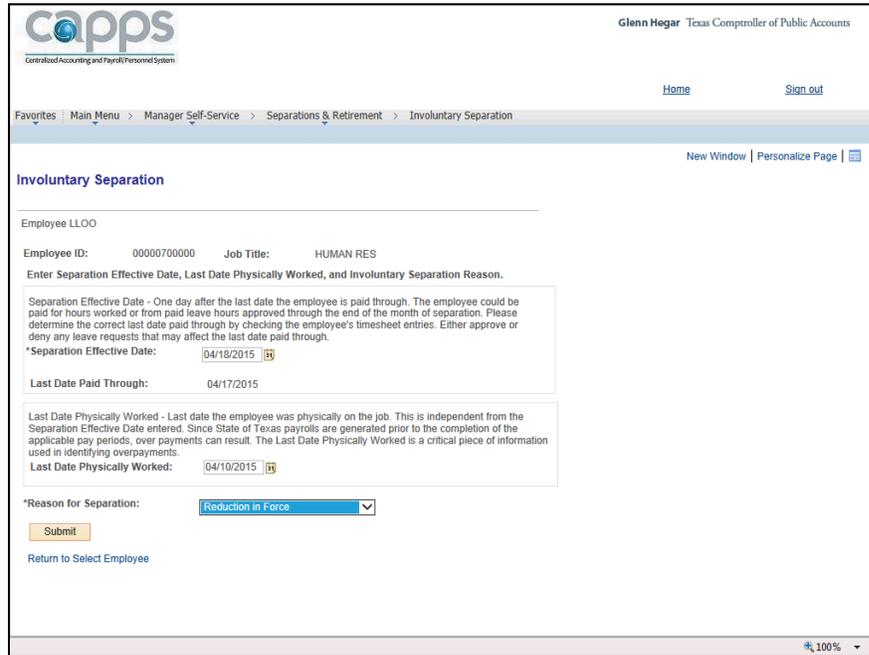
CAPPS HR/PAYROLL

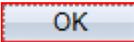
EUT Course



Step	Action
8.	The last day the employee physically worked is April 10. Click the 10 link. 
9.	Click the Reason for Separation list. 

Step	Action
10.	Click the Reduction in Force list item. Reduction in Force



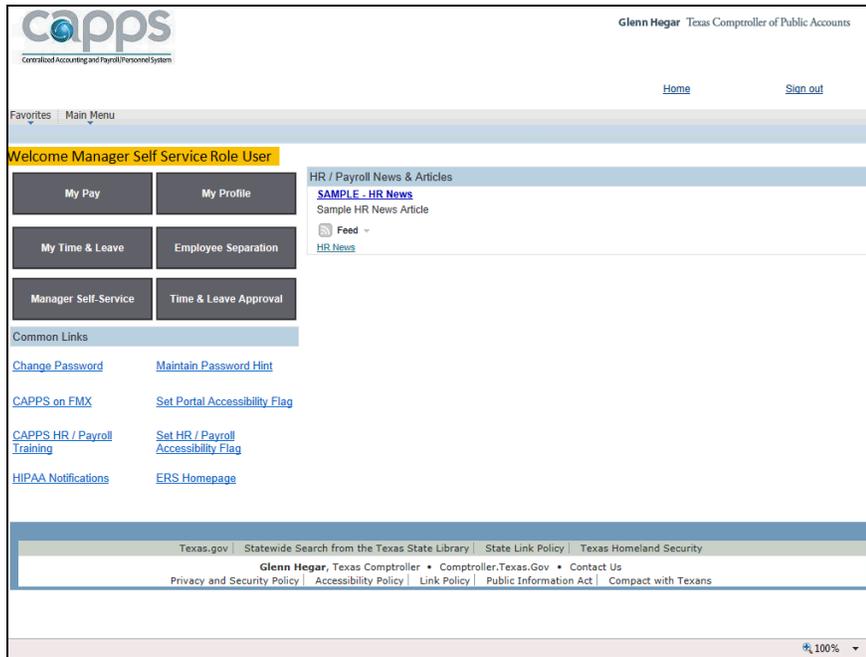
Step	Action
11.	Click the Submit button. 
12.	Click the OK button. 
13.	Click the OK button. 
14.	The Super User will monitor terminations, and will make sure that managers are transferring out balances appropriately. Annual Leave and FLSA Overtime will be paid out automatically in CAPPS after the employee has been off payroll for 30 days; the payout will then be processed on the next available payroll. Managers are responsible for zeroing out any remaining leave balances according to their agency's rules.
15.	An email will be automatically generated if a manager does not enter a separation in a timely manner.
16.	Congratulations! You have successfully completed this lesson. End of Procedure.

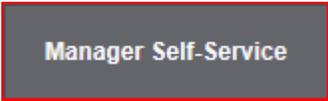
Separation Due to Death

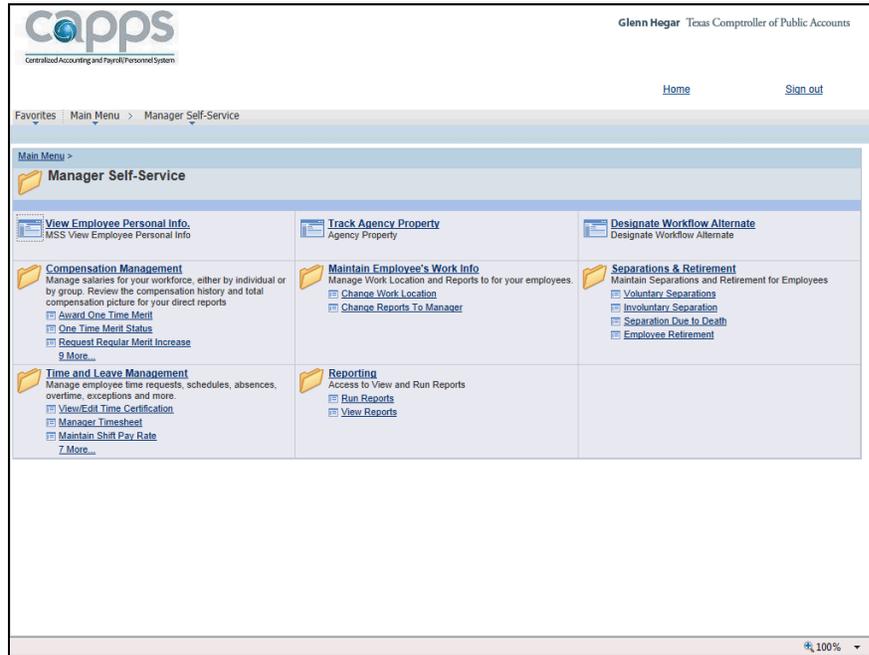
Section 6 - Lesson 3 Exercises - Separation Due to Death

Procedure

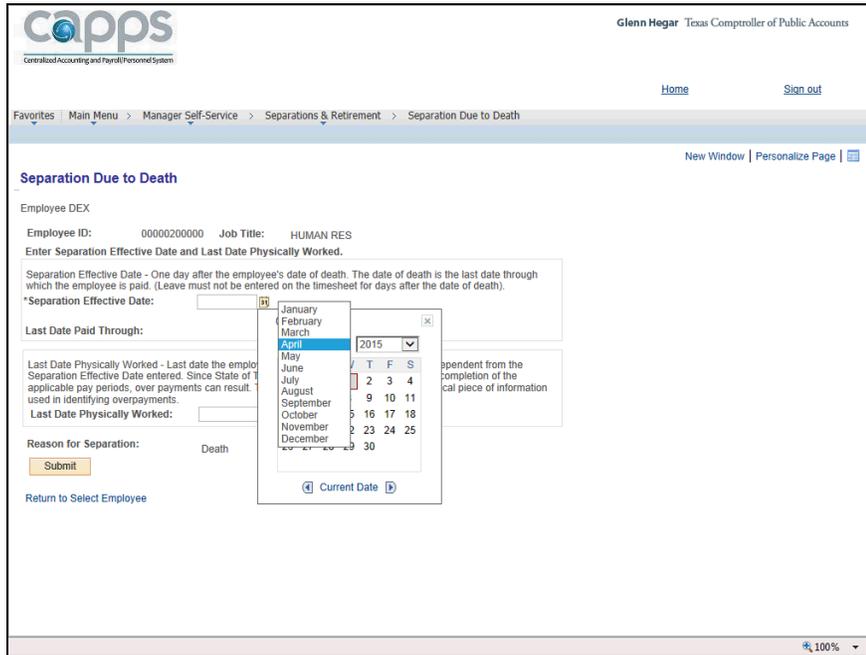
When the separation cause is death, the employee is terminated and CAPPS will automatically calculate any payments due.



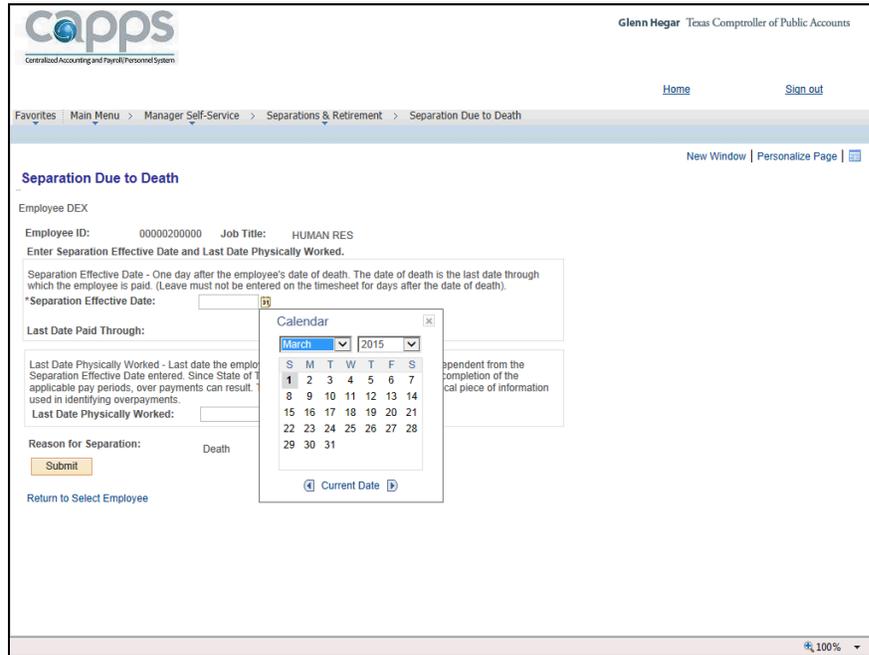
Step	Action
1.	<p>Navigate to the Separation Due to Death page.</p> <p>Click the Manager Self-Service button.</p> 



Step	Action
2.	Click the Separations & Retirement link. Separations & Retirement
3.	Click the Separation Due to Death link. Separation Due to Death
4.	Choose the deceased employee. Click the Employee DEX link. Employee DEX
5.	Enter the *Separation Effective Date . Click the Choose a date (Alt+5) button. 
6.	Click the button to the right of the field. 



Step	Action
7.	<p>The employee's date of death was March 27, 2015, therefore the *Separation Effective Date will be March 28, 2015.</p> <p>Click the March list item.</p> <p>March</p>



Step	Action
8.	Click the 28 link. 
9.	Enter the Last Date Physically Worked , March 20, 2015. Click the Choose a date (Alt+5) button. 
10.	Click the button to the right of the field. 

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[Favorites](#) [Main Menu](#) > [Manager Self-Service](#) > [Separations & Retirement](#) > [Separation Due to Death](#)
New Window | Personalize Page |

Separation Due to Death

Employee DEX

Employee ID: 0000200000 Job Title: HUMAN RES

Enter Separation Effective Date and Last Date Physically Worked.

Separation Effective Date - One day after the employee's date of death. The date of death is the last date through which the employee is paid. (Leave must not be entered on the timesheet for days after the date of death).

*Separation Effective Date: 03/28/2015

Last Date Paid Through: 03/27/2015

Last Date Physically Worked - Last date the employee was physically on the job. This is independent from the Separation Effective Date entered. Since State of Texas payrolls are generated prior to the completion of the applicable pay periods, over payments can result. The Last Date Physically Worked is a critical piece of information used in identifying overpayments.

Last Date Physically Worked:

Reason for Separation: Death

[Return to Select Employee](#)

Calendar

2015

January						
February						
March						
April						
May						
June						
July		2	3	4		
August		9	10	11		
September		16	17	18		
October		23	24	25		
November		30				
December						

100%

Step	Action
11.	Click the March list item. March

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[Favorites](#) [Main Menu](#) > [Manager Self-Service](#) > [Separations & Retirement](#) > [Separation Due to Death](#)
New Window | Personalize Page |

Separation Due to Death

Employee DEX

Employee ID: 0000200000 Job Title: HUMAN RES

Enter Separation Effective Date and Last Date Physically Worked.

Separation Effective Date - One day after the employee's date of death. The date of death is the last date through which the employee is paid. (Leave must not be entered on the timesheet for days after the date of death).

*Separation Effective Date: 03/28/2015

Last Date Paid Through: 03/27/2015

Last Date Physically Worked - Last date the employee was physically on the job. This is independent from the Separation Effective Date entered. Since State of Texas payrolls are generated prior to the completion of the applicable pay periods, over payments can result. The Last Date Physically Worked is a critical piece of information used in identifying overpayments.

Last Date Physically Worked:

Reason for Separation: Death

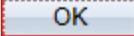
[Return to Select Employee](#)

Calendar

March 2015

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

100%

Step	Action
12.	Click the 20 link. 
13.	Click the Submit button. 
14.	In the case of Separation Due to Death , any Lump Sum payment is automatically processed for payment after 14 days, and will pay out on the next available payroll. Managers are responsible for zeroing out any remaining leave balances, according to their agency's rules. Click the OK button. 
15.	Click the OK button. 
16.	An email will be automatically generated if a manager does not enter a separation in a timely manner.
17.	Congratulations! You have successfully completed this lesson. End of Procedure.

Employee Retirement

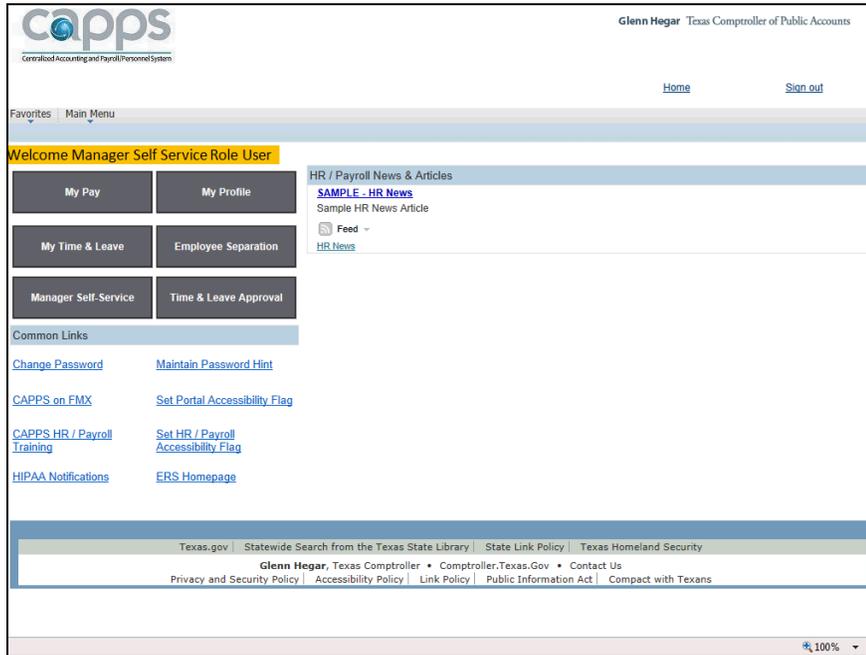
Section 6 - Lesson 4 Exercises - Employee Retirement

Procedure

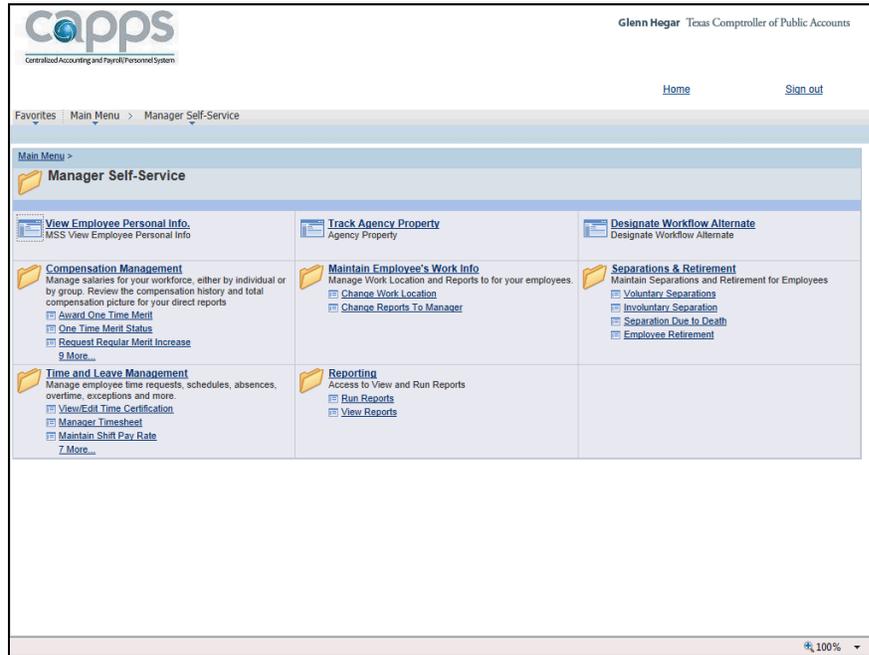
Employees send retirement requests to managers. Managers can review and complete the retirement request using **Manager Self-Service**.

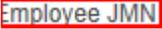
CAPPS HR/PAYROLL

EUT Course



Step	Action
1.	Navigate to the Employee Retirement page. Click the Manager Self-Service button. <div style="border: 2px solid red; padding: 5px; display: inline-block; background-color: #444; color: white;"> Manager Self-Service </div>



Step	Action
2.	Click the Separations & Retirement link. 
3.	Click the Employee Retirement link. 
4.	Click the Employee JMN link. 
5.	Enter the *Separation Effective Date . Click the Choose a date (Alt+5) button. 
6.	Click the button to the right of the field. 

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Home Sign out

Favorites Main Menu > Manager Self-Service > Separations & Retirement > Employee Retirement

New Window | Personalize Page |

Employee Retirement

Employee JMN
Employee ID: 00000400000 Job Title: HUMAN RES

Enter Retirement Separation Effective Date and Last Date Physically Worked.

Separation Effective Date - One day after the last date the employee is paid through. The employee could be paid for hours worked or from paid leave hours approved through the end of the month of separation. Please determine the correct last date paid through by checking the employee's timesheet entries. Either approve or deny any leave requests that may affect the last date paid through.

*Separation Effective Date:

Last Date Paid Through:

Last Date Physically Worked - Last date the employee worked or from paid leave hours approved through the end of the month of separation. Please determine the correct last date paid through by checking the employee's timesheet entries. Either approve or deny any leave requests that may affect the last date paid through.

Last Date Physically Worked:

Reason for Separation: Retirement

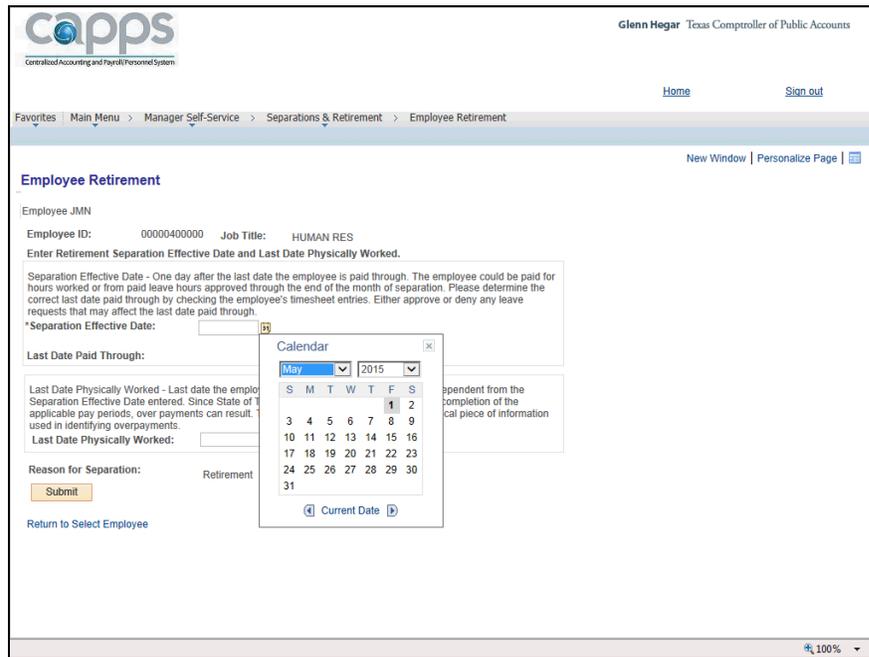
Submit

Return to Select Employee

Calendar pop-up showing months: January, February, March, **April**, May, June, July, August, September, October, November, December. Year: 2015. Days of the week: V T F S. A tooltip for the date selection says: "dependent from the completion of the fiscal piece of information".

100%

Step	Action
7.	<p>The last date the employee was paid through was April 30, 2015.</p> <p>Click the May list item.</p> <p>May</p>



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Home Sign out

Favorites Main Menu > Manager Self-Service > Separations & Retirement > Employee Retirement

New Window | Personalize Page

Employee Retirement

Employee JMN

Employee ID: 0000400000 Job Title: HUMAN RES

Enter Retirement Separation Effective Date and Last Date Physically Worked.

Separation Effective Date - One day after the last date the employee is paid through. The employee could be paid for hours worked or from paid leave hours approved through the end of the month of separation. Please determine the correct last date paid through by checking the employee's timesheet entries. Either approve or deny any leave requests that may affect the last date paid through.

*Separation Effective Date:

Last Date Paid Through:

Last Date Physically Worked - Last date the employee worked before separation. This date is dependent from the completion of the final piece of information.

Last Date Physically Worked:

Reason for Separation: Retirement

Submit

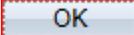
Return to Select Employee

Calendar

May 2015

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

Current Date

Step	Action
8.	Click the 1 link. 
9.	Click the Choose a date (Alt+5) button. 
10.	The last date the employee physically worked was April 30, 2015. Click the 30 link. 
11.	Click the Submit button. 
12.	Note: Managers are responsible for zeroing out remaining leave balances, according to their agency's rules. Click the OK button. 
13.	Click the OK button. 
14.	An email will be automatically generated if a manager does not enter a separation in a timely manner.

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

Section 7 - Designate Workflow Alternate

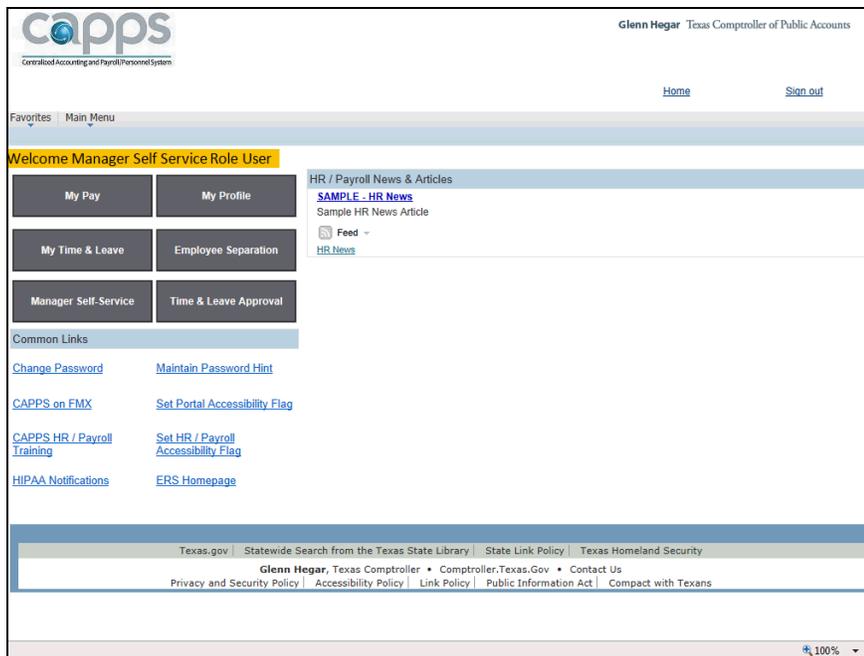
Section 7 - Designate Workflow Alternate

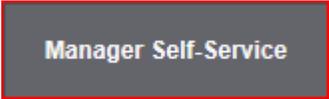
Designate Workflow Alternate

Section 7 - Lesson 1 Exercises - Designate Workflow Alternate

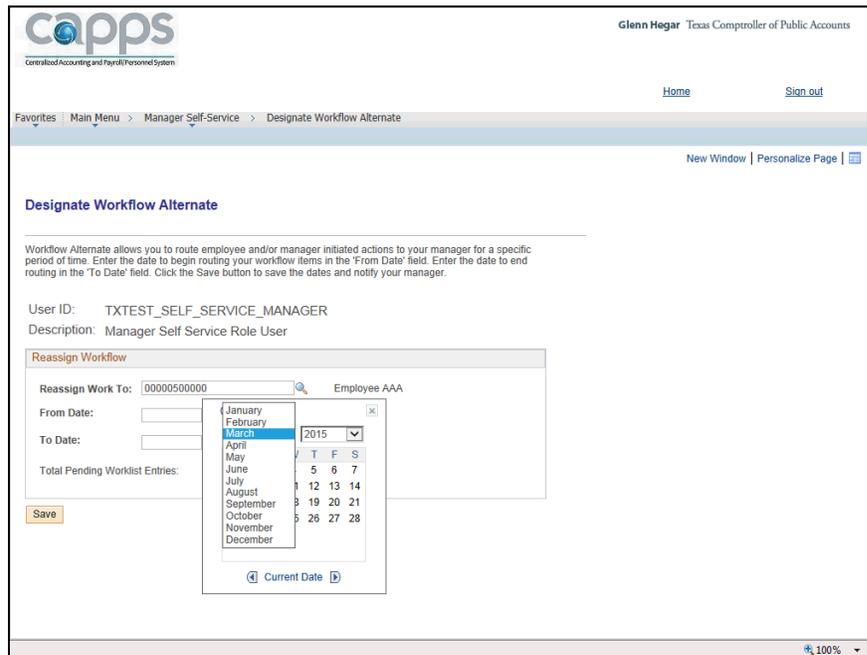
Procedure

In this lesson, you will see how Designate Workflow Alternate lets a manager temporarily route report actions (for their direct reports) to a different manager.

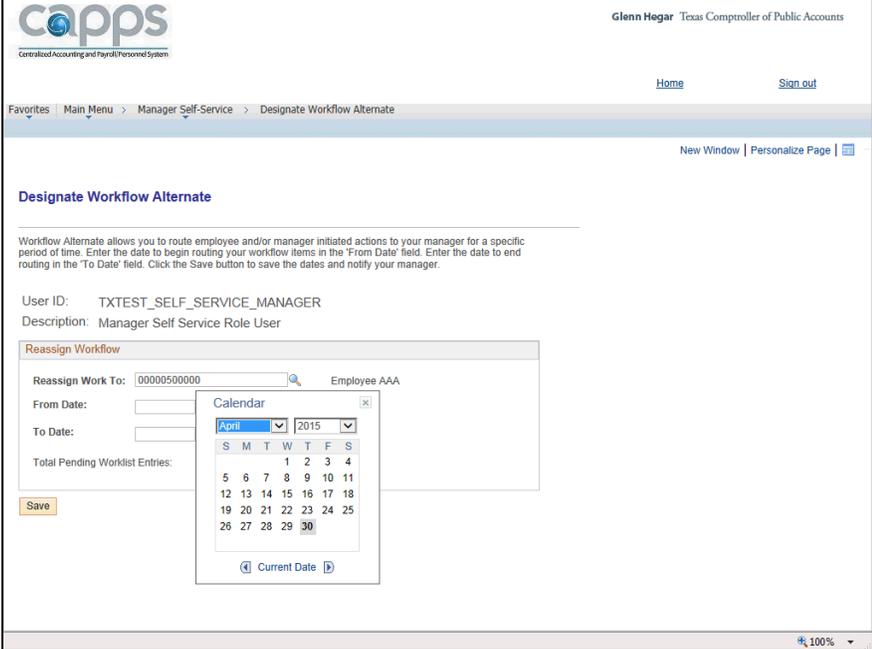


Step	Action
1.	Click the Manager Self-Service button. 
2.	Click the Designate Workflow Alternate link. <u>Designate Workflow Alternate</u>

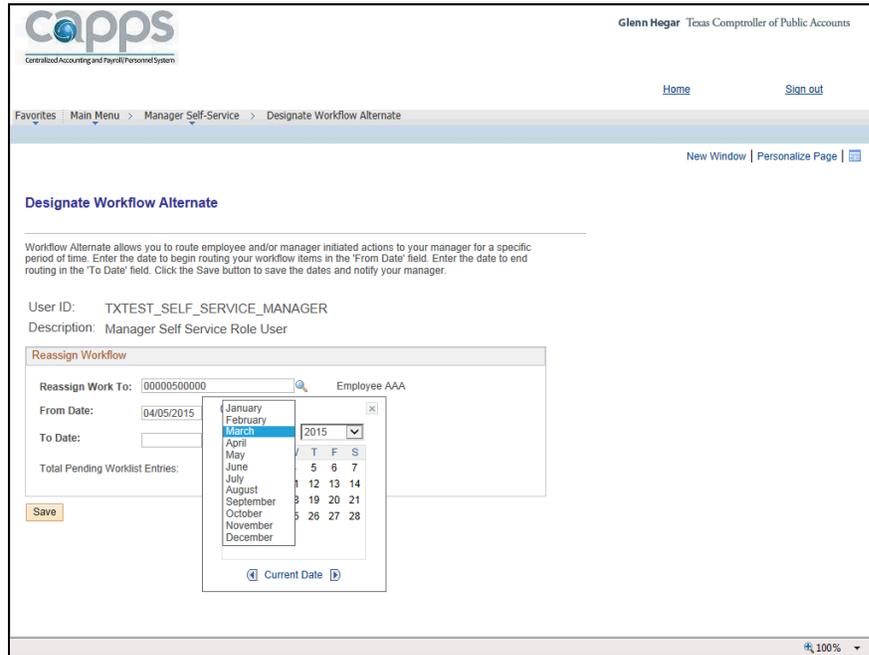
Step	Action
3.	<p>When the system opens the Designate Workflow Alternate page, the Reassign Work To field will default with your manager's Empl ID (employee ID) and Name.</p> <p>Click the Choose a date (Alt+5) button.</p> 
4.	<p>Enter the date you want the reassignment to take effect.</p> <p>Click the button to the right of the field.</p> 



Step	Action
5.	<p>Click the April list item.</p> <p>April</p>



Step	Action
6.	Click the 5 link. 
7.	Enter the alternate's last day to receive your workflow items. Click the Choose a date (Alt+5) button. 
8.	Click the button to the right of the field. 



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Home Sign out

Favorites Main Menu > Manager Self-Service > Designate Workflow Alternate

New Window | Personalize Page

Designate Workflow Alternate

Workflow Alternate allows you to route employee and/or manager initiated actions to your manager for a specific period of time. Enter the date to begin routing your workflow items in the 'From Date' field. Enter the date to end routing in the 'To Date' field. Click the Save button to save the dates and notify your manager.

User ID: TXTEST_SELF_SERVICE_MANAGER
Description: Manager Self Service Role User

Reassign Workflow

Reassign Work To: 00000500000 Employee AAA

From Date: 04/05/2015

To Date:

Total Pending Worklist Entries:

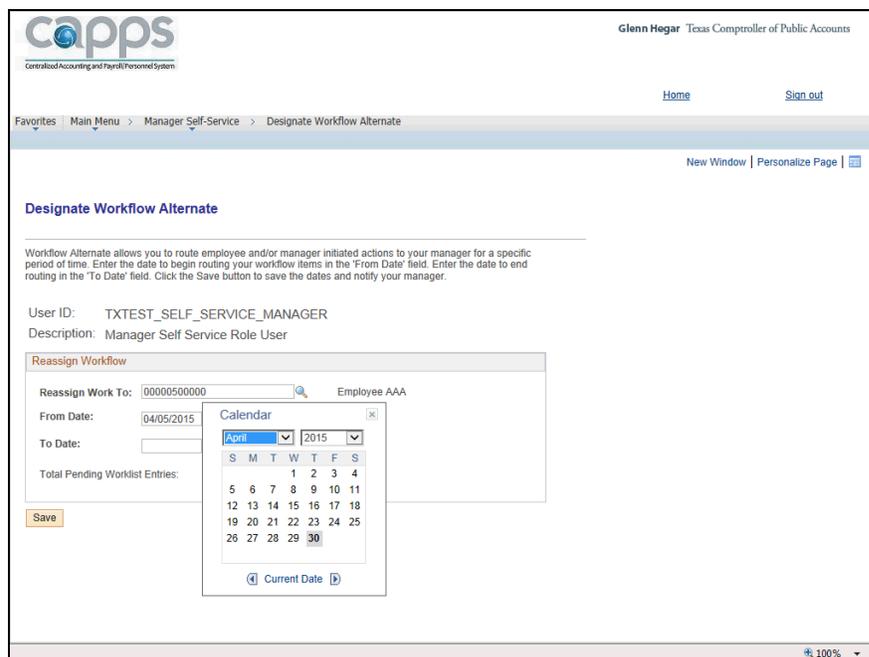
Save

Calendar (2015)

January					
February					
March					
April					
May					
June	5	6	7		
July	12	13	14		
August	19	20	21		
September	5	26	27	28	
October					
November					
December					

Current Date

Step	Action
9.	Click the April list item. April



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Home Sign out

Favorites Main Menu > Manager Self-Service > Designate Workflow Alternate

New Window | Personalize Page

Designate Workflow Alternate

Workflow Alternate allows you to route employee and/or manager initiated actions to your manager for a specific period of time. Enter the date to begin routing your workflow items in the 'From Date' field. Enter the date to end routing in the 'To Date' field. Click the Save button to save the dates and notify your manager.

User ID: TXTEST_SELF_SERVICE_MANAGER
Description: Manager Self Service Role User

Reassign Workflow

Reassign Work To: 00000500000 Employee AAA

From Date: 04/05/2015

To Date:

Total Pending Worklist Entries:

Save

Calendar (2015)

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

Current Date

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Step	Action
10.	Click the 11 link. 
11.	You have reassigned your workflow to the alternate for the designated time period. Click the Save button. 
12.	Click the OK button. 
13.	Congratulations! You have successfully completed this lesson. End of Procedure.