EUT Course 130 –
Agency Human Resource Management

PeopleSoft Version 9.2

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CAPPS Human Resources

Hiring Activities

Section 1: Hiring Activities

Objectives:

- Understand key concepts that affect the new process.
- Learn how to create an employee or contingent worker in CAPPS for a new hire, re-hire, or Return-to-Work Retiree.
- Learn how to assign a position to that person and enter their compensation.
- Learn what additional information needs to be entered for the new hire.

Please note that this training is specific to the CAPPS Human Resources system, and only covers the part of business processes that are performed in the system. Some processes may be affected by outside process steps, documentation requirements, or Agency-specific policies and procedures that are not covered in this training.

Creating an Employee and Assigning a Position

Section 1 Exercises, Lesson 1: Creating an Employee and Assigning a Position

Use the CAPPS Custom Hire page to create a New Hire in the system, add an Organizational Relationship, assign a Position, and enter Compensation.

Procedure

In this exercise, you will use the CAPPS Custom Hire page to create a New Hire in the system and add an Organizational Relationship.

Then you will use the Job Data page to assign a Position and enter Compensation.

Step	Action
1.	When you have become familiar with navigating in CAPPS, you may prefer to use the menu links to find your screen. In these simulations you will use the Menu link at the top of the screen instead, so that the entire navigation path can be clearly demonstrated.
2.	Navigate to the CAPPS Custom Hire screen as follows: Click the **Main Menu** button.

Step	Action
3.	Click the **Workforce Administration** menu.
4.	Click the **Job Information** menu.
5.	Click the **CAPPS Custom Hire** menu. **Note:** Later lessons in this course may skip through the navigation menus to this last step, which displays the whole path.
6.	The navigation path to reach each screen is also displayed in the "breadcrumb" trail at the top of the screen.
7.	The CAPPS Custom Hire process begins with this screen. Here you will enter the National ID, Company, and Hire date for New Hires and Rehires.
8.	The National ID number is usually the employee's Social Security Number. Enter the desired information into the **National ID** field. For this example, enter "**608999999**".
9.	As soon as the **National ID** is entered, CAPPS checks to see if this person already has an employment record in the system. If it found a record, it would fill in the Empl ID and Name at this point. Since it did not find a record of previous employment, those fields remain blank for now.
10.	Whenever you see a Find icon beside a field, you should click on the icon and select a value from the list. Click the **Look up Company (Alt+5)** button.
11.	This list shows the companies that you are allowed to access. Select the appropriate company for the new hire. Click the **608** link.

Step	Action
12.	Dates can be selected from a calendar by clicking the Date icon. Click the **Choose a date (Alt+5)** button.
13.	This person will be hired as of March 11, 2015. Since the correct month and year are displayed, select the day. Click the **11** link.
14.	Before you click **Continue,** double-check the **National ID** and **Hire Date.** Once they are saved, they create a permanent record and cannot be changed. Click the **Continue** button.
15.	Notice that the Person ID (or Empl ID) has not been generated yet. CAPPS did not find a previous record for this National ID number. Since no previous record was found, your next task is to enter the required personal information about the new hire.
16.	Real names are not used in the training environment, so for this example, our new employee is **Mr. Abcd Employee, Jr**. Click the **Add Name** button.
17.	**Prefix** is optional, but will be used in this example. Open the **Prefix** dropdown list.
18.	Click the **Mr** list item.
19.	Click in the **First Name** field.
20.	Enter the desired information into the **First Name** field. Enter "**Abcd**".
21.	Press **[Tab]** until you get to the **Last Name** field.
22.	Enter the desired information into the **Last Name** field. Enter "**Employee**".

Step	Action
23.	Click the **Suffix** list.
24.	Click the **Junior** list item.
25.	Click the **Refresh Name** button to display the name as it will appear in CAPPS.
26.	**Tip:** Before moving on, double check the spelling, and make sure the first and last names aren't reversed. (Mr. Employee will appreciate the courtesy.) Click the **OK** button.
27.	**Date of Birth** can be selected from the calendar. Mr. Employee was born on March 11, 1975. Click the **Choose a date (Alt+5)** button.
28.	The calendar will close when you click on the numbered date, so save that for last. Open the dropdown list for the year.
29.	Click the scrollbar to find the appropriate year.
30.	Select **1975.**
31.	Click the number **11**.
32.	Note that the **Date of Birth** is now filled in. The **Birth Country** defaults to **USA,** based on the National ID entered. **Birth State** and **Location** are not required.

Step	Action
33.	If the employee is a **Commissioned Peace Officer,** check this box. If the employee is a Commissioned Peace Officer, all of the **Information Release Indicators** will automatically be set to "No". In this example, Mr. Employee is not a Commissioned Peace Officer.
34.	Human Resources should set the **Information Release Indicators** to **Release All.** These can be changed individually in Employee Self Service if the employee chooses to do so. This is a required field. Click the **Release All** option.
35.	**Gender** is a required field. Click the **Gender** list.
36.	Select **Male**.
37.	**Highest Education Level** defaults to **A-Not Indicated,** which is sufficient for this required field if education level is not known. Click the **Highest Education Level** list.
38.	Mr. Employee has a **2-Year College Degree**.
39.	Click the **Marital Status** list.
40.	Mr. Employee is **Married**.
41.	Click the **Language Code** list.
42.	Mr. Employee speaks **English**.

Step	Action
43.	Scroll down to see the rest of the page. Click the scrollbar.
44.	National ID, at the bottom of the page, has been filled in from the previous screen, and cannot be edited. Double-check to make sure that the ID number is correct before moving on, then click the scroll bar to return to the top of the page. Click the scrollbar.
45.	Click the **Contact Information** tab.
46.	The **Contact Information** tab holds Address, Phone, and Email information. Click the **Add Address Detail** link.
47.	Click the **Add Address** link.
48.	Enter Mr. Employee's address into the **Address 1** field. Enter "**1111 NotReal St**".
49.	Click in the **City** field.
50.	Mr. Employee lives in Austin, so that goes into the **City** field. Enter "**Austin**".
51.	Click in the **State** field.
52.	Texas goes in the **State** field. Enter "**TX**".

Step	Action
53.	Click in the **Postal** field.
54.	Mr. Employee's Zip code goes in the **Postal** field. Enter "**78727**".
55.	Use the Lookup icon to find the County code. Click the **Look up County (Alt+5)** button.
56.	You could scroll through this list, but Travis is way down near the bottom. Change the **Search By** to **Description** so that you can search. Click the **Search by** list.
57.	Click the **Description** list item.
58.	We're searching for Travis County, so enter "**Travis**" in the **begins with** field.
59.	Click the **Look Up** button.
60.	The County Code for Travis is 227. Click the **Travis County** link.
61.	Mr. Employee's address is complete. Click the **OK** button.
62.	The address you just entered displays in the Address History field. Click the **OK** button.

Step	Action
63.	Now enter Mr. Employee's home phone number. Click the **Phone Type** list.
64.	Click in the **Telephone** field.
65.	Mr. Employee's **Telephone** number is “**5125558888**".
66.	Click the **Preferred** option.
67.	Open the **Email Type** dropdown menu.
68.	Select the email type. **Business** email will be entered by an automated process after hiring is complete. However, if the employee chooses to have a **Home** address on file, it can be added at this time. Click the **Home** list item.
69.	Click in the **Email Address** field.
70.	Enter "**home@email.com**" into the **Email Address** field.
71.	Click the **Preferred** option.
72.	**Important note**: When you click in the Email Type field, the system opens a row in the database in which you will enter the email address. However, if you click in the Email Type field and then do NOT enter an address, that row is left behind, but empty. If you should happen to click in the field and then NOT enter a valid email address, you must click the minus sign to delete the empty row before proceeding.
73.	Click the **Regional** tab.
74.	The Regional tab holds information related to Ethnicity, Citizenship, Military Status, etc.

Step	Action
75.	Ethnic Group is a required field. Click the **Look up Ethnic Group (Alt+5)** button.
76.	Mr. Employee is an American Indian. Click the **AMIND** link.
77.	Click the **Military Status** list.
78.	Mr. Employee is **Not a Veteran.**
79.	Click the **Organizational Relationships** tab.
80.	Notice that your **Organizational Relationship** is already selected, based on your use of the **CAPPS Custom Hire** function. This selection cannot be changed on this page.
81.	Notice, also, that the **Person ID** still says "NEW". An Empl ID has not yet been issued.
82.	Do NOT proceed to the next step unless you have double-checked that your **National ID** and **Hire Date** are correct. The Personal Data record will be saved in the next step, creating a permanent record for that ID number and hire date.
83.	Click the **Add Relationship** button to save the record and generate the Empl ID.
84.	The Empl ID number now appears, and the employee record has been saved. Next we will enter the position for the new employee, and complete the Job Data screens.
85.	Notice that the Effective Date and Action code are already entered, and cannot be changed. Both of these values came from the CAPPS Custom Hire page. Click the **Look up Reason Code** icon.

Step	Action
86.	Notice the Reason Codes that are listed when "Hire" is selected in the Action field. The Reason Codes in CAPPS are the same as they were previously. For this example we will choose "010 - New Hire or Rehire", but if this employee is being transferred you could use 012 or LEG instead. Click the **010** link.
87.	The Position record has been set up in advance, and contains most of the information the system needs about Mr. Employee's new job. Click in the **Position Number** field.
88.	Mr. Employee has been hired as a Director in the Motor Carrier division of the DMV. Enter his **Position Number,** which is "**00002295**".
89.	When you press the tab key, the system will verify the position number and import position information into various fields. Press **[Tab]**.
90.	Notice that the Position information automatically populates.
91.	Click the **Job Information** tab.
92.	Verify that the Job Information has populated correctly, including description, Supervisor level, and standard hours.
93.	Then move on to the **Job Labor** tab.
94.	These fields are not currently being used.
95.	Click the **Payroll** tab.
96.	Verify that the correct **Pay Group** has been selected, or select the appropriate value if your Agency has more than one option. Verify that **Employee Type** is selected.

Step	Action
97.	Click the **Salary Plan** tab.
98.	The **Salary Plan** and **Grade** also come from the Position record. Verify that they are correct.
99.	Click the **Compensation** tab.
100.	The actual rate of Mr. Employee's compensation must be entered manually. **Comp Rate** is always entered on a **Monthly** basis. Click in the **Comp Rate** field.
101.	Mr. Employee will be paid $10,000.00 per month. Enter "**10000**" in the **Comp Rate** field.
102.	Click the **Calculate Compensation** button.
103.	The calculated compensation rate is now displayed. Click the **OK** button.
104.	The system returns you to the Organizational Relationship screen. The initial hiring process is complete. **Note:** At this point the hire is now saved. Any changes to Personal or Job Data must be made in the applicable core Data Pages. Do not try to rehire to make data changes.
105.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Creating a Contingent Worker and Assigning a Position

Section 1 Exercises, Lesson 2: Creating a Contingent Worker and Assigning a Position

Use the CAPPS Non-Employee Add page to set up a new contingent worker, add an Organizational Relationship, and assign a position.

The Job Code for a Contingent Worker is always the same: NonEmp. The Position Number will be different each time, and will contain Reports To manager, location, Agency, and other information. Headcount for a Contingent Worker position can be more than one.

Note: Do not enter a National ID number for a contingent worker. The CAPPS Non-Employee Add page asks for an Empl ID number instead. If the contingent worker has not previously been an employee, they must have a TINS number issued prior to being set up in CAPPS. The TINS number is a Texas Identification Number that is issued by the Comptroller to anyone wishing to do business with the State of Texas. The TINS number should be used as the Empl ID for contingent workers.

Procedure

In this exercise, you will use the CAPPS Non-Employee Add page to create a Contingent Worker in the system and add an Organizational Relationship.

Then you will use the Job Data page to assign a Position.

Step	Action
1.	Begin by navigating to the **CAPPS Non-Employee Add** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > CAPPS Non-Employee Add.**
2.	Note that this screen asks for Empl ID instead of National ID. The Empl ID is the TINS number, obtained for the contingent worker prior to being hired. TINS numbers are also referred to as "7-numbers" because they usually start with a seven. In the training environment, these numbers will not start with a seven for confidentiality purposes. Enter the TINS number into the **Empl ID** field. For this example, enter "**09000876353**".
3.	Click the **Look up Company (Alt+5)** button.
4.	Select your Agency's Company code from the list. Click the **608** link.

Step	Action
5.	Open the calendar to select the effective date of the hire. Click the **Calendar** icon.
6.	The effective date for this hire is March 11, 2015. Click the **11** link.
7.	Be sure that you double-check your **Empl ID** and **Effective Date** of hire before proceeding. When this record is saved in a later step, a permanent record will be created, and the **Empl ID** and **Hire Date** cannot be changed after that. Click the **Continue** button.
8.	All of the personal information about an employee is set up in this screen. Notice the four tabs: - Biographical Details - Contact Information - Regional - Organizational Relationships. Each of these tabs can be used to track information about the worker. **However, the only required fields for a Contingent Worker are Name and Address.**
9.	The TINS number that you entered previously is displayed here. If this person existed in CAPPS previously, some information may automatically populate. This information should be validated in case it is out of date.
10.	Begin setting up **Biographical Details** by entering the name. Click the **Add Name** button.
11.	You can use the tab key to move from field to field, or you can click on them with your mouse. Click in the **First Name** field.

Step	Action
12.	Because this is a training database, we do not use real names in our simulations. So our Contingent worker's name is Test Contingent. Enter "**Test**" into the **First Name** field.
13.	Click in the **Last Name** field.
14.	Enter "**Contingent**" into the **Last Name** field.
15.	Click the **Refresh Name** button to see how the name will be displayed.
16.	Click the **OK** button.
17.	Notice that the name is displayed at the top of the screen, and in the **Display Name** field.
18.	Other biographical details, such as **Date of Birth,** are optional for Contingent workers. The only required fields are **Name** and **Address**. Agencies may use the remaining fields as needed.
19.	Scroll down to see the rest of the screen. Click the scrollbar.
20.	Notice that for a contingent worker, the **National ID** field is blank at this point. Once the Personal Data is saved, the **National ID** will default to 999-99-9999.
21.	Click the scrollbar to scroll back to the top of the screen.
22.	Next we will enter the address. Click the **Contact Information** tab.
23.	Click the **Add Address Detail** link.
24.	If the country is blank, fill it in. Then click the **Add Address** link.

Step	Action
25.	Enter the contingent worker's address into the **Address 1** field. **Address 2** may also be entered as needed. Enter "**555 Fictitious Plaza**".
26.	Enter "**Houston**" into the **City** field.
27.	Enter "**TX**" into the **State** field.
28.	Enter "**77070**" into the **Postal** field.
29.	Click the **Look up County** button.
30.	Click the **Search by** list.
31.	Change **County Code** to **Description**.
32.	Enter "**Harris**" into the **begins with** field.
33.	Click the **Look Up** button.
34.	Click the **Harris County** link.
35.	Click the **OK** button.
36.	Review the address for accuracy, and then click the **OK** button.
37.	As mentioned previously, **Phone** and **Email** are optional, and can be used at the Agency's discretion.
38.	Click the **Organizational Relationships** tab.

Step	Action
39.	Notice that **Contingent Worker** is pre-selected, and cannot be changed. The **CAPPS Non-Employee Add** page that you are using is only used for Contingent Workers.
40.	Do NOT proceed to the next step unless you have double-checked that your **Empl ID** and **Hire Date** are correct. The Personal Data record will be saved in the next step, creating a permanent record for that ID number and hire date.
41.	Click the **Add Relationship** button to save your work so far, and move on to the **Job Data** screens.
42.	Notice that the **Action/Reason** code is already filled in for you, and that there are only two tabs at the top of the screen: **Work Location** and **Job Information.**
43.	Click in the **Position Number** field.
44.	Enter the position number "**00002296**" into the **Position Number** field.
45.	When you enter the **Position Number** and press the **Tab** key, the rest of the information about the job should auto-populate. Press **[Tab]**.
46.	**Position Description, Company, Business Unit,** and other fields have just populated. **Note:** The Job Code for a Contingent Worker is always the same, although the Position Number will be different each time it is used. Headcount for a Contingent Worker position can be more than one. Agencies may choose to have a single Position for all of their Contingent Workers, or have separate Position Numbers for different groups of Non-Employees. However, in CAPPS they will all have the same Description, "Non Employee".
47.	Click the **Job Information** tab.
48.	As mentioned previously, the **Job Code** for Contingent Workers is always the same: **NONEMP.** Verify that the **Job Information** is correct.
49.	Click the scrollbar.

Step	Action
50.	If everything is correct, click the **OK** button to save your work.
51.	**Tip:** Have you noticed the pinwheel yet? When your computer is processing, this pinwheel will spin. Anytime your screen appears to freeze, look for the pinwheel. Always wait for the pinwheel to stop spinning before you do anything else. Sometimes it might take a while, but if you continue clicking you may trigger something unexpected or freeze up your computer.
52.	When processing is complete, you will be returned to the **Organizational Relationships** tab. Press **Enter** to continue.
53.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Rehires and Return-to-Work Retirees

Section 1 Exercises, Lesson 3: Rehires and Return-to-work Retirees

CAPPS Custom Hire is used to enter a Rehire. As soon as the National ID is entered, CAPPS will check to see if that number has been used before in the system. If a record is found, CAPPS will populate some fields with information from the employee's previous employment. Verify that this information is still correct.

A Return-To-Work Retiree is rehired in the same way as any other rehire, through the CAPPS Custom Hire page. If an employee retired more than 90 days ago, Web Services updates the appropriate fields in the Job Data screens when that employee is rehired.

Procedure

In this exercise, you will use the CAPPS Custom Hire page to rehire a Return-to-Work Retiree.

Then you will use the Job Data page to assign a Position.

Step	Action
1.	Begin by navigating to the **CAPPS Custom Hire** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > CAPPS Custom Hire.**

Step	Action
2.	Enter the Social Security number into the **National ID** field. Enter "**608990220**", and then press the **Tab** key.
3.	CAPPS recognized this **National ID** number right away and filled in the **Empl ID** and the **Name.**
4.	Enter your Agency number into the **Company** field. Enter "**608**".
5.	Click the **Choose a date** button.
6.	Click the list for the Month.
7.	Select **April**.
8.	Click the **1** link.
9.	Click the **Continue** button.
10.	Verify that this is the correct Empl ID. Click the **OK** button.
11.	The **Information Release Indicator** is a required field. Human Resources should always select **Release All.** The employee can update these settings in **Employee Self Service.** Select the **Release All** option.
12.	If any of the information on the Biographical Details tab needs to be updated, do so now. Then click the **Contact Information** tab.

Step	Action
13.	Update address, phone, and email information as needed. Click the **Add a new row** button.
14.	Click the **Phone Type** list.
15.	Click the **Personal Cell** list item.
16.	Click in the **Telephone** field.
17.	Enter the updated phone number, "**512/555-0220**", into the **Telephone** field.
18.	Click the **Preferred** option.
19.	Click the **Regional** tab.
20.	If necessary, update the information on the **Regional** tab, and then click the **Organizational Relationships** tab.
21.	The **Employee** relationship is auto-selected on this screen, because the **CAPPS Custom Hire** form is only used for employees. Click the **Add Relationship** button to save your work and proceed to the **Job Details** area.
22.	Notice that the **Effective Date** and **Action** are already filled out for you. CAPPS recognized that this person has a previous record of employment, so the **Action** is "Rehire".
23.	Click the **Look up Reason Code** button.
24.	The **Reason Code** for a Rehire is 010. Click the **010** link.

Step	Action
25.	Next, enter the position number for the employee, or look it up in the list. Click the **Look up Position Number** button.
26.	You can use the **Advanced Lookup** to search for your position. **Caution:** Notice that there may be multiple positions with the same description. It is important to select the right one. If you use the **Lookup** to search by **Description,** be sure you confirm that you have selected the correct position number. Click the **Advanced Lookup** link.
27.	Open the dropdown list for the **Description** field.
28.	Change **begins with** to **contains**.
29.	Click in the **Description** field.
30.	Enter the portion of the position title that you know. For this example, you are looking for a **Trainer.** Enter "**Trainer**" into the **Description** field.
31.	Press **[Enter]**.
32.	The search results are shown below. In this case, there is only one Trainer Position to choose from. Click the **00001121** link.
33.	The position number is entered into the field, and information about that position populates other fields as well.
34.	Click the scrollbar to view the bottom of the screen.
35.	Web Services has updated the Retirement Code automatically.
36.	To see the updated **Return-to-Work** information, click the **Employment Data** link.

Step	Action
37.	**Return-to-Work Information** has been updated for the rehired employee.
38.	Return to the **Job Data** screen by clicking the **Job Data** link.
39.	Click the **Job Information** tab.
40.	Verify the **Job Information** that was imported with the Position, and then click the **Payroll** Tab.
41.	Verify that the payroll information has posted correctly, and enter **Pay Group** if needed. Then click the **Salary Plan** tab.
42.	Note the **Salary Plan** and **Grade** -- B21. Click the **Compensation** tab.
43.	Click in the **Comp Rate** field.
44.	Enter a salary amount that is within the range for Grade B21. For this example, enter "**5000**".
45.	**Note:** Compensation will not calculate and will not be saved if you forget this step. Click the **Calculate Compensation** button.
46.	Once the compensation has been calculated, you are finished with this phase of the rehire. Click the **OK** button.
47.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

New Hire Profile: Emergency Contact Information

Section 1 Exercises, Lesson 4: New Hire Profile: Emergency Contact Information

Procedure

In this lesson, you will enter Emergency Contact Information for the person you just hired.

Step	Action
1.	Begin by navigating to the **Emergency Contact** page. The Navigation is: **Main Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact.** Click **Emergency Contact**.
2.	**Note:** If you're performing this function immediately after entering other information about an employee, the system automatically goes to the **Emergency Contact** page for the last person you were editing. Otherwise, it would have taken you to the **Search** page first. If this is not the person you want to edit, click the **Return to Search** button. In this case, the correct employee is displayed.
3.	Click in the **Contact Name** field.
4.	Enter the name of the **Emergency Contact** person in the **Contact Name** field. For this example, enter "**Spouse Employee**".
5.	Open the **Relationship to Employee** list.
6.	Click the **Spouse** list item.
7.	Click the **Primary Contact** option.
8.	If the Emergency Contact person has a different address than the Employee, click **Edit Address** and enter that address.

Step	Action
9.	For this example, the **Emergency Contact** has the same address as the Employee. Click the **Same Address as Employee** option.
10.	Notice that the Employee's current address defaulted in the **Address** field, because the Emergency Contact's address is the same as the Employee's address.
11.	The **Same Phone as Employee** option works the same way. Click the **Same Phone as Employee** option.
12.	Notice that the Employee's phone number defaulted into the **Phone** field, below.
13.	To list a different phone number for the Emergency Contact, unselect the **Same Phone as Employee** checkbox.
14.	Click in the **Phone** field.
15.	Enter the Emergency Contact's phone number into the **Phone** field. Enter "**5125559933**".
16.	Click the **Save** button.
17.	Your Emergency Contact can have more than one phone number. Click the **Other Phone Numbers** tab.
18.	Click the **Phone Type** list.
19.	Click the **Personal Cell** list item.
20.	Click in the **Phone** field.

Step	Action
21.	Enter the Emergency Contact's alternate phone number into the **Phone** field. Enter "**7135558855**".
22.	Click the **Save** button.
23.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

New Hire Profile: Disability Information

Section 1 Exercises, Lesson 5: New Hire Profile: Disability Information

Disability information is tracked by an outside vendor, and will not be entered into CAPPS. However, the Disability page has been enabled, so that Agencies can use it to track Accommodation Requests if they choose to do so. Please note that this function does not interface with any outside systems or reports.

This lesson demonstrates how to navigate to these pages and provides a general overview. Specific instructions for the use of these pages can be determined by the Agencies.

Procedure

This lesson demonstrates how to navigate to the Disabilities pages and provides a general overview. Specific instructions for the use of these pages can be determined by the Agencies.

Step	Action
1.	Begin by navigating to the **Disabilities** page. The Navigation is: **Main Menu > Workforce Administration > Personal Information > Disability > Disabilities.** Click **Disabilities**.
2.	For this example, we will look up our employee by last name. Click in the **Last Name** field.

Step	Action
3.	Enter "**Employee**" into the **Last Name** field.
4.	Click the **Search** button.
5.	Click the **Abcd Employee** link.
6.	To see all of the options on this page, click the **Expand section** button.
7.	Veteran's Disability Status is tracked in a different application.
8.	Mr. Employee is disabled, but he is not a Vet, so he is not a Disabled Vet. Click the **Disabled** option.
9.	Click the **Accomm Request** tab.
10.	This screen is used to enter requests for Reasonable Accommodations due to disability. Use of this tab is determined by the Agency.
11.	Click the **Accomm Option** tab.
12.	This screen is used to enter more information about **Accommodation Requests**. Use of this tab is determined by the Agency.
13.	Click the **Accomm Job Task** tab.
14.	This screen is used to enter information about Accommodations related to specific Job Tasks. Use of this tab is determined by the Agency.
15.	When all information has been entered, click the **Save** button.
16.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

New Hire Profile: Citizenship Information

Section 1 Exercises, Lesson 6: New Hire Profile: Citizenship Information

Citizenship information is tracked outside of CAPPS. However, the Citizenship page has been enabled, so that Agencies can use it if they choose to do so. Please note that this function does not interface with any outside systems or reports.

This lesson demonstrates how to navigate to these pages and provides a general overview. Specific instructions for the use of these pages can be determined by the Agencies.

Procedure

This lesson demonstrates how to navigate to the Citizenship page, and provides a general overview. If an Agency decides to use this function, specific instructions can be developed by the Agency for its use.

Step	Action
1.	Begin by navigating to the **Identification Data** page. The Navigation is: **Main Menu** > **Workforce Administration** > **Personal Information** > **Citizenship** > **Identification Data.**
2.	The first of three tabs on the **Identification Data** page allows you to enter **Passport Information.**
3.	Click the **Visa/Permit Data** tab.
4.	The second tab provides an area where you can enter information about **Visas** or **Permits.**
5.	Click the **Employee Photo** tab.
6.	The third tab could be used to display a photograph of the employee, such as a badge photo, for identification purposes. This function is currently disabled.

Step	Action
7.	Don't forget to save your work if you have entered information on these tabs. Click the **Save** button.
8.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

New Hire Profile: Driver's License Information

Section 1 Exercises, Lesson 7: New Hire Profile: Driver's License Information

Driver's License Information is another optional function that has been enabled so that Agencies can use it if they have the need. It consists of a single page in the Biographical Information menu, where Driver's License information can be recorded.

Procedure

In some instances, it might be necessary to track Driver's License information about the employee. This lesson demonstrates how to navigate to the Driver's License page, and provides a general overview of the screen.

If an Agency decides to use this function, specific instructions can be developed by the Agency for use of this feature.

Step	Action
1.	Begin by navigating to the **TX Driver's License Data** page. The Navigation is: **Main Menu > Workforce Administration > Personal Information > Biographical > TX Driver's License Data.**
2.	Search for the employee whose information you want to enter. Click in the **Last Name** field.
3.	Enter "**Employee**" into the **Last Name** field.
4.	Click the **Search** button.

Step	Action
5.	Click the **09000876100** link.
6.	This is the screen used to record Driver's License information.
7.	When you have finished, click the **Save** button.
8.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Transfers, Moves, and Terminations

Section 2: Transfers, Moves, & Terminations

Objectives:

- Learn how to transfer employees to a different agency, department, or position.
- Understand how Legislative transfers are processed.
- Understand all of the different termination types in CAPPS.
- Learn how to process all termination types.
- Learn how leave balances are zeroed out upon termination.

Please note that this training is specific to the CAPPS Human Resources system, and only covers the part of business processes that are performed in the system. Some processes may be affected by outside process steps, documentation requirements, or Agency-specific policies and procedures that are not covered in this training.

Transferring to a Different Agency

Section 2 Exercises, Lesson 1: Transferring to a Different Agency

Learn to transfer employees from and to your agency by terminating the outgoing employees, and using the CAPPS Custom Hire page to rehire incoming employees.

Note: The termination and rehire actions must be coordinated between the respective agencies.

- The destination agency should NOT hire the transferring employee until AFTER the system processes the termination of the transferring employee at the originating agency. If the employee is transferring from one CAPPS Agency to another, the system will prevent them from being hired before the termination is complete. However, if the transfer is not CAPPS to CAPPS, then the system will not stop the hire.
- In addition, the date of hire at the two agencies must be the same, to prevent a break or overlap in service.

Procedure

When an employee makes an inter-agency transfer, he is terminated in the "losing" agency and then rehired in the "hiring" agency, using special Action/Reason codes for each transaction.

This lesson will demonstrate that process, by transferring one employee out of the agency, and another employee in.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data.**
2.	Mr. Employee is transferring to another agency. Enter "**09000876100**" into the **Empl ID** field.
3.	Click the **Search** button.
4.	Begin your changes by adding a new row to the tables. Click the **Add a new row** button.
5.	The **Effective Date** for this transfer will be 4/01/2015. Click the **Choose a date** button.
6.	Click the list.
7.	Select **April.**
8.	Click the **1** link.
9.	In order to transfer Mr. Employee to another agency, you must first terminate him in his current agency, and coordinate with the gaining agency to make sure the rehire is entered for the correct Effective Date. **Note:** The agency that he is transferring to should not rehire him until after you complete this termination at his current agency. Open the **Action** list.

Step	Action
10.	Select **Termination** from the **Action** list.
11.	Click the **Look up Reason Code** button.
12.	Select the **Reason Code** for a **Transfer to Another Agency.** Click the **065** link.
13.	When you are terminating for the purpose of a transfer to another agency, you must always enter the destination agency number in the **Agency Transfer To** field. This is a required field. Click in the **Agency Transfer To** field.
14.	Mr. Employee is transferring in to the Department of Information Resources, which is Agency #313. Enter "**313**" into the **Agency Transfer To** field.
15.	Now you just need to save the change. Scroll down to the bottom of the page.
16.	Click the **Save** button.
17.	Once the system has completed processing the termination, the hiring agency, the Department of Information Resources (Agency 313), will enter a Rehire for Mr. Employee in his new position, effective the same day as the termination we just entered. Since we can't see that agency's data, let's look at the second half of the process by hiring a different person, who is transferring in to our agency. Click the scrollbar to go back to the top of the screen.
18.	Let's start over at the **Home** page. Click the **Home** link.

Step	Action
19.	When someone is transferring in to our agency, we begin our part of the process by Rehiring them. **Note:** Remember that the employee's termination at the other agency must be completed prior to their rehire at your agency, so that Web Services will be able to provide correct data. Rehires are performed through the **CAPPS Custom Hire** page.
20.	Enter the Social Security Number of the employee into the **National ID** field. For this example, enter "**608995885**".
21.	If CAPPS recognizes this **National ID** number, it will fill in the **Empl ID** and the **Name** right away. Press **[Tab]**.
22.	Notice that the **Empl ID** and **Name** have already been entered. This employee previously worked for a CAPPS agency, and so the system retrieved that information from the tables.
23.	Continue by entering your Agency number in the **Company** field. Enter "**608**".
24.	Click in the **Hire Date** field.
25.	Remember that the **Hire Date** must be the same day as the Effective Date of the termination at the employee's previous agency. This prevents a break or overlap in service. You can type the hire date into the field instead of selecting it from the list. Enter "**012615**" into the **Hire Date** field.
26.	Press **[Tab]** to format the date.
27.	Click the **Continue** button.

Step	Action
28.	This is the message that you will see if you try to rehire your transferree before she has been terminated at another CAPPS agency. You will not be able to continue with the Rehire until the termination has been processed. In this case, the message is just shown for training purposes. Click the **OK** button and pretend you didn't see that.
29.	Instead, you should see this message, which means that CAPPS wants you to verify that you have the right person. Click the **OK** button.
30.	Verify that the **Information Release Indicators** are set. If they are blank, select **Release All**. Note that these indicators can be changed by the employee in Employee Self Service. Click **Release All.**
31.	Click the **Contact Information** tab.
32.	Verify that **Contact Information** is current, and update it as needed. Let's add a new phone number for this employee. Click the **Add a new row (Alt+7)** button.
33.	Click the **Phone Type** list.
34.	Click the **Personal Cell** list item.
35.	Click in the **Telephone** field.
36.	Enter the desired information into the **Telephone** field. Enter "**512/555-3373**".

Step	Action
37.	Click the **Preferred** option.
38.	Click the **Regional** tab.
39.	Regional Settings may be updated if necessary, but probably will not change at this point.
40.	Click the **Organizational Relationships** tab.
41.	Since this is a Rehire, and you are using the **CAPPS Custom Hire** page, the only **Organizational Relationship** available is **Employee.** Click the **Add Relationship** button to save your work so far and move to the **Job Data** page.
42.	Click the **Look up Reason Code (Alt+5)** button.
43.	Notice the **Reason Codes** available for this transfer. If this was a Legislatively Mandated Transfer, you would use the **Reason Code** "LEG".
44.	For this example, the transfer is not Legislatively Mandated. Click the **Reason Code** for an **Inter-Agency Transfer In**, which is **012**.
45.	Ms. Person is joining our Agency as an Instructional Designer. Enter her new Position number, **"00001121"**, in the **Position Number** field.
46.	Notice that information about the position has been automatically populated. Check the **Agency Transfer From** field to be sure that it has been completed. This information was provided by Web Services from the other agency's termination process. Press **Enter** to continue.

Step	Action
47.	Click the **Job Information** tab.
48.	**Job Information** comes from the Position number. Verify that everything looks correct.
49.	Click the **Payroll** tab.
50.	Verify that all information was populated correctly, or select the correct **Pay Group** if necessary.
51.	Click the **Salary Plan** tab.
52.	Note the **Salary Plan** and **Grade,** which defaulted from the Job Code, so that you can verify the compensation amount.
53.	Then click the **Compensation** tab.
54.	Click in the **Comp Rate** field.
55.	Ms. Person's salary will be $4023.16 per month, as that is the beginning salary for Salary Plan B, Grade 21 in FY15. Enter "**4023.16**" into the **Comp Rate** field.
56.	Always click the **Calculate Compensation** button when entering or adjusting salary.
57.	Click the **OK** button.
58.	If you see this message, it means that the position number you chose is already occupied. Either you chose the wrong position, or the person who formerly occupied this position has not yet been terminated. Best practice is that each Employee position should have only one incumbent. Again, this message is only shown for training purposes. Click the **OK** button.

Step	Action
59.	Look for the **Saved** icon to verify that the process has successfully completed. When the system finishes saving your work, it will return to the **Organizational Relationship** page. Press **Enter** to continue.
60.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Prior State Service Row Insertion

Section 2 Exercises, Lesson 3: Prior State Service Row Insertion

When transferring from a CAPPS Central agency to another CAPPS Central agency, Prior State Service Rows are inserted automatically.

However, when transferring from a CAPPS Hub agency or from a Non-CAPPS, Prior State Service must be entered manually.

Procedure

Whenever an employee transfers from one agency to another, or leaves an agency and then comes back later, a row must be added to the Prior State Service table to ensure their State Effective Service date accurately reflects all of their service. If the Prior State Service is from a CAPPS Central Agency, the row will automatically be inserted. If not, then the row must be validated and manually entered.

This lesson will demonstrate where that information can be reviewed, when it needs to be updated manually, and how it is entered.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data.**

Step	Action
2.	The employee we will be working with in this lesson is named Empl Person. Her first name is unique, so let's search for Ms. Person by her first name. Click in the **Name** field.
3.	Enter "**empl**" into the **Name** field.
4.	Press **[Enter]**.
5.	If the system only finds one record with your search criteria, the record will open directly on the screen instead of asking you to select from a list.
6.	To view or enter **Prior State Service** rows, we need to go to the **Employment Data** page. The link for **Employment Data** is at the bottom of the **Job Data** page. Click the scrollbar to scroll down.
7.	Click the **Employment Data** link.
8.	**Prior State Service** is the second tab on the **Employment Data** page. Click the **Prior State Service** tab.
9.	The record shows that Ms. Person has worked for four different agencies over the past thirty years. But not all service may appear immediately following the hire. A daily process inserts the most recent prior period of employment in CAPPS. If the most recent period of service was outside of CAPPS Central, then the Agencies must validate and manually insert that period of service. **Note:** Has that daily process run yet? Before manually inserting a period of service that is missing, wait at least one day for the process to run overnight.
10.	To update the record and include the missing service, begin by adding a row to the table. Click the **Add a new row (Alt+7)** button.
11.	Ms. Person worked for the Secretary of State from October 1, 2006 to July 16, 2012. Enter the Agency number for the Secretary of State, which is "**307**", in the **Agency** field.

Step	Action
12.	Press **[Tab]** to get to the next field.
13.	Click in the **Hire Date** field.
14.	Enter the date she was hired, "**10012006**", in the **Hire Date** field.
15.	Press **[Tab]** to get to the **Term Date** field.
16.	Enter the termination date, "**07162012**", into the **Term Date** field.
17.	Press **[Tab]**.
18.	Click the **Save** button.
19.	Notice that the **Total Prior State Service** row updated when the record was saved.
20.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Moving Within the Same Agency

Section 2 Exercises, Lesson 2: Moving within the Same Agency

When an employee changes positions within an agency, it is referred to as a "Move" rather than a "Transfer". Moves from one position to another within an agency are processed by using the Action code "Data Changes", and selecting the appropriate Reason code.

In this lesson, you will learn to move an employee from one position within the agency to another, with no change in salary.

Procedure

When an employee moves from one position to another within the same agency, it is not considered a transfer. Instead of terminating the employee from one agency and rehiring him at the other, you will simply change the position number for the employee.

In this scenario, Mr. Employee is moving from one position to another, with no change in salary. The first four digits of the Job Code stay the same.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data**
2.	The director of a different department within this agency has resigned, and Mr. Employee has been chosen to move into his position. Search for Mr. Employee by name. Click in the **Name** field.
3.	Enter "**abcd**" into the **Name** field.
4.	Click the **Search** button.
5.	To change Mr. Employee's position number, you must first add a new **Effective Dated** row. Click the **Add a new row (Alt+7)** button.
6.	Notice that when you added the row, your Row Counter changed from "**1 of 2**" to "**1 of 3**".
7.	The new row also displays the current date, by default. This position change is going to take place on April 1, 2015. Click the **Choose a date (Alt+5)** button.
8.	Click the Month list.
9.	Select **April**.
10.	Click the **1** link.

Step	Action
11.	The **Action** for this change is **Data Change,** which in this case is already selected. Click the **Look up Reason Code (Alt+5)** button.
12.	To change positions with no change in salary, the **Reason Code** that you will use is **038 - Change Non-Salary Rate Data.** In this case, the first four digits of the Job Code for the new Position are the same as the former position, so 038 is the correct **Reason Code.** Click the **038** link.
13.	Note that Mr. Employee is currently a Director of the Motor Carrier Division. His new position will be a Director as well.
14.	Click in the **Position Number** field.
15.	Clear out the current value by clicking the **X** in the field.
16.	Enter the new position number for Mr. Employee, "**00001588**", in the **Position Number** field.
17.	Press **[Tab]**.
18.	Notice that the position information has updated, and the new position description is Dir Enforcement Div.
19.	Nothing else should be changed, but you should still validate the position attributes on the other tabs. Click the **Job Information** tab.
20.	Verify that the data on the **Job Information** tab is correct, and then click the **Payroll** tab.
21.	Verify that the data on the **Payroll** tab is correct, and then click the **Salary Plan** tab.

Step	Action
22.	The **Plan** and **Grade** did not change for this move. Verify that the data on the **Salary Plan** tab is correct, and then click the **Compensation** tab.
23.	There is no change in compensation in this case. Click the **Save** button.
24.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Entering a Termination

Section 2 Exercises, Lesson 4: Entering a Termination

All types of Terminations are entered the same way, with the same Action code and a different Reason for each. The Reason Codes for terminations are listed below:

057 - Resignation in lieu of involuntary separation.
060 - Voluntary separation from agency.
063 - Termination at will.
064 - Reduction in force.
065 - Transfer to a different state agency or institution of higher education with no break in service.
067 - Dismissal for cause.
068 - Retirement.
069 - Death.

Remember that there may be other business process steps required for a termination that do not take place in CAPPS. These outside processes are not covered in this CAPPS-specific training.

In this lesson you will learn how to enter a termination due to retirement.

Procedure

When entering a termination, the basic steps followed are the same for each termination type. However, the Reason Code and Effective Date may differ, and additional information may be required.

This lesson demonstrates how to enter a termination for an employee who is retiring.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data.**
2.	After a long career with the Texas Baseline Agency, Ms. Temp Orary has decided to retire. Click in the **Empl ID** field to search for Ms. Orary by ID number.
3.	Enter "**00000000259**" into the **Empl ID** field.
4.	Press **[Enter]**.
5.	Ms. Orary's Job Data page is displayed. Add a new row to the table for the change you're about to make. Click the **Add a new row (Alt+7)** button.
6.	Ms. Orary is retiring on April 30th, the end of the month. Therefore the **Effective Date** for the termination is May 1, 2015. For other termination types, the **Effective Date** selected should be one day after the last day for which she was paid. Click the **Choose a date (Alt+5)** button.
7.	Remember to select the month and year first, and then the day. Click the Month list.
8.	Click the **May** list item.
9.	Click the **1** link.

Step	Action
10.	The Effective Date of 5/01/2015 is displayed. Next, open the **Action** list.
11.	Select **Termination** from the **Action** list.
12.	Notice that as soon as you select **Termination** for your **Action**, the **Last Date Physically Worked** is automatically filled in as one day before the **Effective Date** of the termination.
13.	Next, enter the **Reason Code** for the termination. Click the **Look up Reason Code (Alt+5)** button.
14.	Select the **Reason Code** of **Retirement** from the list. Click the **068** link.
15.	Scroll to the bottom of the screen to save your work.
16.	Click the **Save** button.
17.	Other types of Terminations would be entered the same way, with some minor variations. For example, if the termination is due to Transfer to another Agency, you would complete "Agency Transfer To" field with the destination Agency number. Remember that there may be other Agency-specific business process steps required for a termination, which do not take place in CAPPS. These outside processes are not covered in this CAPPS-specific training.
18.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Job Data Management

Section 3: Job Data Management

Objectives:

- Search for an employee by name or National ID
- Change a Name, Address, Phone Number, or other Personal Data
- View the BRP Indicator
- View Time Reporter Information
- Enter a promotion or reclassification
- Enter a Merit Increase or Equity Adjustment
- Make retro-active or future-dated changes
- Predict and mitigate the impact of changes on Time & Labor

Please note that this training is specific to the CAPPS Human Resources system, and only covers the part of business processes that are performed in the system. Some processes may be affected by outside process steps, documentation requirements, or Agency-specific policies and procedures that are not covered in this training.

Searching for an Employee by Name or National ID

Section 3 Exercises, Lesson 1: Updating Personal Information

Scenario 1: Searching for an Employee by Name or National ID

Procedure

The customized CAPPS Employee Search can be used to search for an Employee by Empl ID, First Name, Last Name, National ID, or User ID.

This lesson will demonstrate the use of this tool.

Step	Action
1.	Begin by navigating to the **CAPPS Employee Search** page. The Navigation is: **Main Menu > Workforce Administration > Personal Information > CAPPS Employee Search.**
2.	Let's start by searching for an employee by last name. Click in the **Last Name** field.
3.	We're going to search for one of our test people. His last name is "Employee". Enter "**Employee**" into the **Last Name** field.
4.	Click the **Search** button.
5.	Everyone with that last name will be listed in the Search Results. Clicking on any piece of data will take you to a summary form for that employee. Click the **09000876100** link.
6.	This summary gives some basic information about the Employee, which you can use to access other records in CAPPS. We now know Mr. Employee's **Employee ID, User ID,** and **National ID.** Information retrieved will be specific to companies you are allowed to access. Click the **Return to Search** button.
7.	When you return to the Search screen, Mr. Employee's Empl ID is already displayed. To search for a different person, you must first clear out this information. Click the **Clear** button.
8.	Let's search for someone by SSN. Click in the **National ID** field.

Step	Action
9.	We know our target's National ID number begins with 6089, but we don't remember the rest. Enter "**6089**" into the **National ID** field.
10.	Click the **Search** button.
11.	There's only one employee who matches that criteria, so the system takes us there automatically. Click the **Return to Search** button.
12.	Now that we have Mr. Employee's Empl ID, let's copy that number so we can use elsewhere in the system. Double-click in the **Empl ID** field.
13.	Right-click in the **Empl ID** field.
14.	Click the **Copy** menu.
15.	The Employee ID can now be pasted in another application.
16.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Changing an Employee's Name and Marital Status

Section 3 Exercises, Lesson 1: Updating Personal Information

Scenario 2: Changing an Employee's Name and Marital Status

Procedure

When an employee needs to have their legal name changed in the system, they must submit the proper paperwork to Human Resources. One occasion on which this might happen is when an employee gets married or divorced.

In this lesson, you will learn how to update an employee's name and marital status.

Step	Action
1.	Begin by navigating to the **Modify a Person** page. The Navigation is: **Main Menu > Workforce Administration > Personal Information > Modify a Person.**
2.	Ms. Contingent just married Mr. Non-Employee, and chose to take his name. Click in the **Last Name** field.
3.	You can enter all or part of the current last name. Enter "**cont**" into the **Last Name** field.
4.	Click the **Search** button.
5.	Click the **608991234** link.
6.	Since this is a change to existing data, you must first add a new row to the database for the update. This preserves the data history. Click the **Add a new row** button.
7.	The displayed name cannot be edited from this screen. Click the **Edit Name** button.
8.	Click in the **Last Name** field.
9.	Clear out the old value by clicking the X in the **Last Name** field.
10.	Enter the employee's new name into the **Last Name** field. Enter "**NonEmployee**".

Step	Action
11.	Click the **Refresh Name** button to update the display.
12.	Click the **OK** button.
13.	The Marital Status field is near the bottom of the screen. Click the scroll bar to move down.
14.	Again, you're making a change to existing data, and the history must be preserved. Click the **Add a new row** button.
15.	Click the **Marital Status** list.
16.	Select **Married**.
17.	Click the **Save** button.
18.	Congratulations, both to you and to the happy couple! You have successfully completed this lesson. **End of Procedure.**

Changing an Address or Phone Number

Section 3 Exercises, Lesson 1: Updating Personal Information

Scenario 3: Changing an Address or Phone Number

Most changes to personal information such as Address and phone number can be made by the employees themselves through the Employee Self-Service portal. However, occasionally it may be necessary for Human Resources to make these updates for an employee. This lesson demonstrates how those changes can be made in HR.

Procedure

This lesson demonstrates how to make changes to an employee's personal information, if for some reason they cannot be made by the employee through the Employee Self Service portal.

Note that address changes made in CAPPS are not sent to the Employee's Retirement System.

In this lesson, we will update an address and phone number.

Step	Action
1.	Begin by navigating to the **Modify a Person** page. The Navigation is: **Main Menu > Workforce Administration > Personal Information > Modify a Person.**
2.	Ms. NonEmployee has moved and changed her phone number. Search for her by last name to find her records. Click in the **Last Name** field.
3.	Enter at least the first few letters of her last name in the **Last Name** field. Enter "**non**".
4.	Press Enter or click the **Search** button.
5.	Ms. NonEmployee's Personal Data page is displayed. Addresses and phone numbers are found on the **Contact Information** tab. Click the **Contact Information** tab.
6.	Add a new row to the table to enter the new information. Click the **Add a new row (Alt+7)** button.
7.	On the new row, open the **Address Type** list.
8.	Click the **Home** list item.
9.	Click the **Add Address Detail** link.

Step	Action
10.	Click in the **Country** field.
11.	Enter "**usa**" into the **Country** field.
12.	Press **[Tab]**.
13.	The **Add Address** link is easy to overlook, so if you click **OK** by accident and end up on the previous screen with no address entered, you're not alone! Click the **Add Address** link.
14.	Click in the **Address 1** field.
15.	Enter "**123 Address Change Street**" into the **Address 1** field.
16.	Click in the **City** field.
17.	Enter "**Houston**" into the **City** field.
18.	Click in the **State** field.
19.	Enter "**TX**" into the **State** field.
20.	Click in the **Postal** field.
21.	Enter the zip code into the **Postal** field. Enter "**77077**".
22.	Click in the **County** field.

Step	Action
23.	If you know the County Code for Houston, enter it here. If not, click the **Look up County (Alt+5)** button.
24.	Houston is located in Harris County. We're going to search for Harris County in the **Description** field. Click in the **Description** field.
25.	Enter "**Harris**" into the **Description** field.
26.	Click the **Look Up** button.
27.	Click the **101** link to select Harris County.
28.	Click the **OK** button.
29.	Double-check the address that appears on the right, and then click the **OK** button.
30.	Notice that the address you just entered appears on the second row with a current **As Of Date**, above, and that the old address is saved for historical purposes.
31.	Next, we're going to add a cell phone number. Click the **Add a new row (Alt+7)** button.
32.	Click the **Phone Type** list.
33.	Click the **Personal Cell** list item.
34.	Click in the **Telephone** field.
35.	Enter "**2815552255**" into the **Telephone** field.

Step	Action
36.	Ms. NonEmployee prefers to be contacted by cell phone. Click the **Preferred** option.
37.	Other fields can be updated as needed, following these same guidelines. Click the **Save** button.
38.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Updating the Information Release Indicator

Section 3 Exercises, Lesson 1: Updating Personal Information

Scenario 4: Updating the Information Release Indicator

Procedure

The Information Release Indicators record whether the employee has authorized the release of certain personal information. They should be set to "Yes" when the employee is hired, but can be changed at the employee's request, or by the employee through Employee Self Service.

This exercise will demonstrate where to find these indicators and how to update them.

Step	Action
1.	Begin by navigating to the **Modify a Person** page. The Navigation is: **Main Menu** > **Workforce Administration** > **Personal Information** > **Modify a Person.**
2.	Search for the person you're updating. Enter "**00000000012**" into the **Empl ID** field, and press **Enter.**

Step	Action
3.	There is a separate indicator for each type of information to be released or protected. HR should set this value to the "Release All" option. Employees can change their own individual settings in Employee Self Service. Click the **Release All** option.
4.	All the indicators are now set to "Y", which means information may be released. Click the **Release None** option.
5.	All of the indicators are now set to "N". No information will be released.
6.	Notice the checkbox for the **Commissioned Peace Officer.** If this box is checked, no information should ever be released.
7.	Be sure to save your updates before you leave. The **Save** button is at the bottom of the screen. Click the scrollbar.
8.	Click the **Save** button.
9.	You'll know your changes were successfully saved when you see this confirmation.
10.	Click the **Home** link to return to the Main Menu.
11.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Viewing the BRP Indicator and Time Reporter Data

Section 3 Exercises, Lesson 2: Viewing the BRP Indicator and Time Reporter Information

Procedure

Links to the Benefit Replacement Pay (BRP) Indicator and the Time Reporter Data screen are found together on the same page. This exercise will demonstrate where to find these links and what information they hold.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data.**
2.	Many options are available when searching for the employee. For example, if you know the last part of the Empl ID but not the first, you can change the search parameters. Click the **Empl ID** list.
3.	"Contains" means that the value you give can be anywhere within the ID. Click the **contains** list item.
4.	Click in the **Empl ID** field.
5.	You know that the Empl ID ends with 0001. Enter "**0001"** into the **Empl ID** field.
6.	Click the **Search** button.
7.	Search results appear below. You may have to scroll down to find them if you're using a smaller monitor. Click the **00000000001** link.
8.	The indicators we're looking for are on the **Employment Data** screen. Click the **Employment Data** link at the very bottom of the page. Scroll down to it if necessary.

Step	Action
9.	Notice that both the **Time Reporter Data** link and the **Employee BRP Indicator** link are located on the right, near the middle of the page. Click the **Time Reporter Data** link.
10.	Time Reporter Data tells you how the employee is set up in the Time & Labor module. This screen is for reference only, and cannot be edited from here. For more information about this data, see the Time & Labor training materials.
11.	Click the scroll bar to scroll downward.
12.	Click the **OK** button.
13.	Click the **Employee BRP Indicator** link.
14.	The current BRP setting is displayed on this screen. This screen is also view-only, and cannot be changed here.
15.	Click the **OK** button.
16.	Click the **Home** link if you wish to exit.
17.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Promoting an Employee

Section 3 Exercises, Lesson 3: Position and Job Data Changes

Scenario 1: Promoting an Employee

Procedure

When an employee gets promoted, HR changes their position number and compensation.

This lesson demonstrates the process for promoting an employee and changing their compensation.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data.**
2.	Ms. Temp Orary has earned a promotion! Let's look her up by Employee ID number. Click in the **Empl ID** field.
3.	Enter "**00000000259**" into the **Empl ID** field.
4.	Click the **Search** button.
5.	Ms. Orary's **Job Data** displays. Insert a new Effective Dated row to record the change to her **Job Data.** Click the **Add a new row (Alt+7)** button.
6.	Ms. Orary's promotion will be effective April 1, 2015. Click the **Choose a date (Alt+5)** button.
7.	Open the Month list and select **April**.
8.	Click the **1** link.
9.	The **Effective Date** is displayed. Next, select the **Action** and **Reason** for this change. Click the **Action** list.

Step	Action
10.	Select **Promotion** from the **Action** list.
11.	Click the **Look up Reason Code (Alt+5)** button.
12.	Select the code for **Promotion.** Click the **020** link.
13.	Then, change the **Position Number.** Click in the **Position Number** field.
14.	To clear the old data out of the **Position Number** field, click on the X.
15.	Enter "**00005478**" into the **Position Number** field.
16.	Information about the new position will populate when you press the **Tab** key. Press **[Tab]**.
17.	Notice that the new position information has been populated. Click the **Job Information** tab.
18.	Verify that the new Job Information has been entered correctly. Click the **Payroll** tab.
19.	Verify that the **Payroll** setup is correct. Click the **Salary Plan** tab.
20.	Verify the Salary Plan information, and make a note of the **Plan** and **Grade** level. Click the **Compensation** tab.

Step	Action
21.	Verify that the salary you are about to enter falls within the range of the **Plan** and **Grade** for this position, and then enter the monthly salary in the **Compensation** field. Click in the **Comp Rate** field.
22.	Enter "**3000**" into the **Comp Rate** field.
23.	You must click the **Calculate Compensation** button or the compensation will not be correctly calculated and saved. Click the **Calculate Compensation** button.
24.	Click the **Save** button.
25.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Demoting an Employee

Section 3 Exercises, Lesson 3: Position and Job Data Changes

Scenario 2: Demoting an Employee

Procedure

The process for demoting an employee is similar to that for promoting. It involves changing to a position number with a different Job Code and compensation rate.

This lesson will demonstrate entering a demotion.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data**

Step	Action
2.	Test Employee T is being demoted to a different position and lower compensation rate. Search for the employee by ID number. Enter "**00000000012**" into the **Empl ID** field.
3.	Click the **Search** button.
4.	The employee's **Job Data** is displayed. Add a new row for the change you're about to enter. Click the **Add a new row (Alt+7)** button.
5.	This demotion will take effect on April 1, 2015. Click the **Choose a date (Alt+5)** button.
6.	Open the month list.
7.	Select **April**.
8.	Click the **1** link.
9.	The **Effective Date** is displayed. Next, select the appropriate **Action** and **Reason** codes. Click the **Action** list.
10.	Select **Demotion** from the **Action** list.
11.	Click the **Look up Reason Code (Alt+5)** button.
12.	Select the **Demotion to Lower Salary** Reason code.

Step	Action
13.	Next, update the **Position Number.** Click in the **Position Number** field.
14.	Click the **X** in the **Position Number** field to clear out the previous value.
15.	Enter the new Position Number into the **Position Number** field. Enter "**00005253**".
16.	Data about the new position will populate the **Work Location** tab as soon as you press the **Tab** key. Press **[Tab]**.
17.	Verify that the **Job Data** has populated correctly, and then click the **Job Information** tab.
18.	Verify the data on the **Job Information** tab and then click the **Payroll** tab.
19.	Verify the information on the **Payroll** tab, and then go to the **Salary Plan** tab.
20.	Make a note of the **Salary Plan** and **Grade,** and then click the **Compensation** tab.
21.	Validate that the salary amount you are about to enter falls within the range for the **Salary Plan** and **Grade,** and then click in the **Comp Rate** field.
22.	Click the **X** in the **Comp Rate** field to clear out the existing data.
23.	Enter the new compensation into the **Comp Rate** field. Enter "**2000**".

Step	Action
24.	As always, click the **Calculate Compensation** button before saving your work.
25.	Click the **Save** button.
26.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Temporary Assignments

Section 3 Exercises, Lesson 3: Position and Job Data Changes

Scenario 4: Temporary Assignments

Procedure

When an employee is put on Temporary Assignment, a row is entered to change their position at the beginning of the assignment and again at the end.

The entries for a temporary assignment are basically the same as other assignment changes, such as a transfer to another Agency or a move to a different position. For each of these changes, the Action and Reason Code indicate what type of transaction is being entered.

In this lesson, you will learn how to enter a row for the beginning and for the end of a Temporary Assignment.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu** > **Workforce Administration** > **Job Information** > **Job Data.**
2.	Mr. Staff Employee is currently an Administrative Assistant II, and he will be filling in for another employee who is going on leave for a month. Search for Mr. Employee by last name. Click in the **Last Name** field.

Step	Action
3.	Enter "**Employee**" into the **Last Name** field, and press **[Enter]**.
4.	Search Results appear at the bottom of the screen. Click the scrollbar.
5.	Click the **00000602634** link to select Staff Employee.
6.	Each change must be entered on a new row, to maintain the history of the employee. Click the **Add a new row (Alt+7)** button.
7.	The temporary assignment is scheduled to begin on April 1, 2015. Click the **Choose a date (Alt+5)** button.
8.	Open the Month list.
9.	Select **April**.
10.	Click the **1** link.
11.	The **Effective Date** is displayed. Next, we will select the appropriate **Action** and **Reason Code.** The **Action Code** for a Temporary Assignment is **Data Change.** By default, the screen displays the last action taken on this employee's record, which also happens to be a Data Change. So this time, we don't need to change the **Action**. Click the **Look up Reason Code (Alt+5)** button.
12.	Select **Temporary Assignment Start** from the **Reason** list.

Step	Action
13.	Next, we will change Mr. Employee's **Position Number** to reflect the temporary assignment. Click in the **Position Number** field.
14.	Click the **X** in the **Position Number** field to clear the current value.
15.	Enter "**00001560**" into the **Position Number** field.
16.	Position information will update when you press the **Tab** key. Press **[Tab]**.
17.	Notice that the Position Description has changed to Administrative Assistant V, and that other position data has been updated.
18.	Click the **Job Information** tab.
19.	Verify that the information on each tab has defaulted in correctly. Click the **Payroll** tab.
20.	Verify that the **Pay Group** and other information are correct. Click the **Salary Plan** tab.
21.	Note the **Salary Plan** and **Grade,** and then click the **Compensation** tab.
22.	Verify that the compensation rate you are about to enter falls within the range for that **Salary Plan** and **Grade,** seen on the previous tab. Click in the **Comp Rate** field.
23.	Click the **X** in the **Comp Rate** field to clear the current value.
24.	Enter the new temporary rate into the **Comp Rate** field. Enter "**3200**".

Step	Action
25.	Always click the **Calculate Compensation** button before saving.
26.	Click the **Save** button.
27.	Click the **Work Location** tab.
28.	Mr. Employee's Temporary Assignment is now in effect, as of April 1, 2015. Note that there are background processes that track the duration of a temporary assignment. The employee's manager will be notified when the temporary assignment is approaching or exceeds the six-month statutory limit.
29.	When the assignment is over, another row should be added to change him back to his previous position. Click the **Home** link to go back to the beginning.
30.	As before, begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data** Click the **Job Data** menu.
31.	Click in the **Last Name** field.
32.	Enter "**employee**" into the **Last Name** field.
33.	Press **[Enter]**.
34.	Scroll down to see the search results.
35.	Click the **Staff Employee** link.
36.	Add a new row for the Temporary Assignment End. Click the **Add a new row (Alt+7)** button.

Step	Action
37.	The assignment will end on May 1, 2015. Click the **Choose a date (Alt+5)** button.
38.	Open the month list.
39.	Select **May**.
40.	Click the **1** link.
41.	The **Effective Date** is displayed. Again, the **Action Code** for this entry is **Data Change**. Since that is already displayed, you don't have to change that field. Click the **Look up Reason Code (Alt+5)** button.
42.	Select **Temporary Assignment End** from the **Reason Code** list.
43.	Next, we will return Mr. Employee to his former position. Click in the **Position Number** field.
44.	Click the **X** in the **Position Number** field to clear out the current value.
45.	Enter "**00001566**" into the **Position Number** field.
46.	Press **[Tab]** to see the position information update.
47.	Review the information on the screen, and then click the **Compensation** tab.
48.	Click the **X** in the **Comp Rate** field to clear out the current value.
49.	Enter Mr. Employee's former rate, "**2703**" into the **Comp Rate** field.

Step	Action
50.	As always, click the **Calculate Compensation** button.
51.	Click the **Save** button.
52.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Leave of Absence

Section 3 Exercises, Lesson 3: Position and Job Data Changes

Scenario 5: Leave of Absence

Procedure

Leave of Absence transactions can be entered in Manager Self Service, if that function is available to your Agency. However, HR can serve as a backup for this function.

Leaves of Absence are entered when the leave period will be one calendar month or more. Otherwise, use the timesheet to record intermittent leave.

This lesson will demonstrate how to put an employee on Leave of Absence, change their Leave reason while on leave, and enter their Return From Leave.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data** Click the **Job Data** menu.
2.	Test Employee ABC is going on Leave of Absence, effective May 1, 2015. Click in the **Name** field to search for this employee.
3.	Enter "**test**" into the **Name** field.

Step	Action
4.	Press **[Enter]**.
5.	Click the scrollbar to find Test Employee ABC.
6.	Click the **00000000123** link.
7.	As with most transactions, a Leave of Absence needs to be entered on a new Effective Dated row. Click the **Add a new row (Alt+7)** button.
8.	Click the **Choose a date (Alt+5)** button.
9.	Click the list.
10.	Click the **May** list item.
11.	Click the **1** link.
12.	The **Effective Date** is displayed. Next, select the **Action** and **Reason Code.** Click the **Action** list.
13.	Click the **Leave of Absence** list item.
14.	Click the **Look up Reason Code (Alt+5)** button.

Step	Action
15.	Notice the different **Reason Codes** displayed in the list. The process for entering each type of Leave is the same, with a different **Reason Code** selected for each: 043 - Leave, No Pay, Regular M43 - Leave, No Pay, Military W43 - Leave, No Pay, Worker's Comp X43 - Leave, No Pay, Disciplinary Y43 - Leave, No Pay, Parental Z43 - Leave, No Pay, FMLA Note that for FMLA or Parental Leave, additional steps are required to establish the FMLA Event. This is covered in Course 140 - Benefits Administration.
16.	This employee is going on Regular Leave, with no pay. Click the **Leave, No Pay, Regular** link.
17.	Click the scrollbar.
18.	Save your work. Click the **Save** button.
19.	The employee's Leave of Absence has been entered, and will become effective on May 1, 2015. Click the scrollbar.
20.	Sometimes the reason for an employee being on leave changes during the leave period. For example, an employee might use up all of her allowable FMLA Leave, but she might still need to be on leave. When events like this occur, the **Reason Code** for the Leave should be changed in CAPPS. Click the **Home** link.
21.	Navigate back to **Job Data** page, and then search for Test Employee ABCD. Click in the **Name** field.

Step	Action
22.	Enter "**test**" into the **Name** field.
23.	Click the **Search** button.
24.	Click the scrollbar.
25.	Click the **00000000122** link.
26.	This employee is currently on FMLA Leave, but her FMLA leave has been used up. She needs to be switched over to Regular Leave. But what date did her original Leave become effective? Click the scrollbar.
27.	To find the **Effective Date** of the current Leave, click the **Include History** button. This will allow you to review past **Effective Dated** rows. Click the **Include History** button.
28.	Notice that there are now 8 records to display, where previously there was just one. Click the **Show next row (Alt+.)** button.
29.	Record **2 of 8** shows us that the **Effective Date** of the current Leave was 7/01/2014. The Employee's FMLA Leave was used up after 3 months. So she needs to be switched over to Regular Leave as of 10/01/2014. Click the **Add a new row (Alt+7)** button.
30.	Change the **Effective Date** to October 1, 2014. Click the **Choose a date (Alt+5)** button.
31.	Click the list.

Step	Action
32.	Click the **October** list item.
33.	Click the list.
34.	Click the **2014** list item.
35.	Click the **1** link.
36.	The **Action** for this entry is **Data Change.** Click the **Action** list.
37.	Click the **Data Change** list item.
38.	Click the **Look up Reason Code (Alt+5)** button.
39.	You are changing her Leave to Regular with No Pay, so click the **Ch Leave, No Pay, Regular** link.
40.	Click the scrollbar.
41.	Click the **Save** button.
42.	Click the scrollbar.
43.	As of 10/01/2014, this employee is now on Regular Leave instead of FMLA. Now let's go back to the beginning and bring her back to work. Click the **Home** link.

Step	Action
44.	You can navigate to the **Job Data** page by using the **Menu** region rather than the breadcrumb trail at the top. Click the **Workforce Administration** link.
45.	This screen follows the same navigation as the breadcrumb trail we've used previously, but organizes it into sections in a table. In the **Job Information** section, click the **Job Data** link.
46.	Click in the **Empl ID** field.
47.	Enter the desired information into the **Empl ID** field. Enter "**00000000122**".
48.	Click the **Search** button.
49.	Click the **Add a new row (Alt+7)** button.
50.	Ms. ABCD is returning to work effective November 17, 2014. Click the **Choose a date (Alt+5)** button.
51.	Click the list.
52.	Click the **November** list item.
53.	Click the list.
54.	Click the **2014** list item.
55.	Click the **17** link.

Step	Action
56.	The **Effective Date** is displayed. Next, select the **Action** and **Reason Code.** Click the **Action** list.
57.	Click the **Return from Leave** list item.
58.	Click the **Look up Reason Code (Alt+5)** button.
59.	Click the **Return From Leave of Absence** link.
60.	Click the scrollbar.
61.	Click the **Save** button.
62.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Reclassifications

Section 3 Exercises, Lesson 3: Position and Job Data Changes

Scenario 6: Reclassifications

Procedure

When a position is Reclassified, the changes made in Position Management will not automatically flow through to Job Data. Instead, an HR Super User with the Position Override role must bring the changes over on a new Effective Dated row.

Position Management and HR must work together to coordinate transactions such as these.

In this lesson, you will learn how to use the Position Override function to update a Reclassified position.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data.**
2.	Enter "**00000000072**" into the **Empl ID** field.
3.	Click the **Search** button.
4.	Click the **00000000072** link.
5.	This employee is currently a Network Specialist III. However, his position has been reclassified as a Network Specialist IV. Position Management has already changed the Job Code in the position record. But the changes to Position Data do not automatically pass through to Job Data. HR must use the **Override Position Data** button to synchronize the data.
6.	Click the **Add a new row (Alt+7)** button.
7.	Notice that the description of the Position has already changed from Network Specialist III to IV. The new row you just inserted contains the updated information for this field.
8.	The **Effective Date** for this reclassification must be the same as the effective date used by Position Management when they changed the Job Code. Click in the **Effective Date** field.
9.	Position Management made the changes effective 4/02/2015. Enter "**040215**" into the **Effective Date** field.
10.	Press **[Tab]**.
11.	Click the **Action** list.
12.	Click the **Job Reclassification** list item.

Step	Action
13.	Click the **Look up Reason Code (Alt+5)** button.
14.	Click the **Reclass, Higher Grade** link.
15.	Click the **Job Information** tab.
16.	Notice that the current **Job Code** is **0289.** The Position Number will not change, but the **Job Code** will.
17.	Click the **Salary Plan** tab.
18.	Notice also that the current **Salary Plan** and **Grade** are **B-20.** These are about to change as well.
19.	Click the **Work Location** tab.
20.	The Override Position button opens the Position fields for editing. Click the **Override Position Data** button.
21.	The label on the button has changed to **Use Position Data.** Clicking on this button again will retrieve the updated Position Data from Position Management, and enter it into the appropriate fields. Click the **Use Position Data** button.
22.	Click the **Job Information** tab.
23.	The **Job Code** has been updated from **0289** to **0290.**
24.	Click the **Salary Plan** tab.
25.	**Salary Plan** and **Grade** have updated as well.
26.	Click the **Compensation** tab.

Step	Action
27.	Good news! He's getting a raise! Click in the **Comp Rate** field.
28.	Click the X in the **Comp Rate** field to clear out the current value.
29.	Enter the new monthly rate, "**4301.16**", into the **Comp Rate** field.
30.	Press **[Tab]**.
31.	Click the **Calculate Compensation** button.
32.	Click the **Save** button.
33.	At this point, the Position Data and Job Data for this employee are back in sync, and the reclassification is complete. Sometimes, however, changes to a position originate in HR instead of Position Management. Please continue to the next lesson, **Syncing Job and Position Data**, to learn more.
34.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Syncing Job and Position Data

Section 3 Exercises, Lesson 3: Position and Job Data Changes

Scenario 7: Syncing Job and Position Data

In most situations, changes to Position Data originate in Position Management. Occasionally, however, changes will originate in HR, when the HR Super User uses the Override Position function to make the change directly in the Job Data page. When this happens, however, Position and Job Data are no longer in sync. The system will generate an email to Position Management, informing them of the change, and the Audit Exception Positions Report will show the discrepancy. Position Management will make the changes in the Position, and then contact HR to re-synchronize Position and Job Data.

This lesson demonstrates that process, from the HR perspective.

Procedure

When changes to a position are entered first in HR instead of Position Management, the Position and Job Data are out of sync.

This lesson demonstrates what must be done in HR to keep the two sides of the Position aligned.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data** Click the **Job Data** menu.
2.	Enter **"00000000089"** into the **Empl ID** field.
3.	Press **[Enter]**.
4.	Test Employee DDDA's position has been reclassified, from Administrative Assistant IV to V. We want to get the Job Code changed right away, to meet a Payroll deadline. So we've decided to make the changes directly in Job Data, rather than waiting for Position Management to initiate the process.
5.	Click the **Salary Plan** tab.
6.	Notice that the current **Salary Plan** and **Grade** is A-15. Go back to the **Work Location** tab.
7.	The change will be made on a new Effective Dated row. The Effective Date will be April 1, 2015. Click the **Add a new row (Alt+7)** button.
8.	Click the **Choose a date (Alt+5)** button.
9.	Click the **1** link.

Step	Action
10.	Click the **Action** list.
11.	Click the **Job Reclassification** list item.
12.	Click the **Look up Reason Code (Alt+5)** button.
13.	Click the **Reclass, Hgh Sal Grp up to 6.8** link.
14.	The Job Code field is normally locked and cannot be edited, so that it stays in sync with Position Management. But an HR SuperUser with the right Security Role can use the **Override Position Data** button to unlock this field. Click the **Override Position Data** button.
15.	Notice all the fields that are now available for editing. Also, the label on the button has changed to **Use Position Data.** We'll leave it that way for now. (That will be important later.)
16.	Click the **Job Information** tab.
17.	Click in the **Job Code** field.
18.	Click the X in the **Job Code** field to clear out the existing value.
19.	Enter the reclassified Job Code, "**0158**", in the **Job Code** field.
20.	Press **[Enter]**.
21.	The Job Code Description updated right away.
22.	Click the **Salary Plan** tab.

Step	Action
23.	The **Plan** and **Grade** have been updated from **A-15** to **A-17.** Click the **Compensation** tab.
24.	A raise comes along with the reclassification (which is why we wanted to beat the Payroll deadline). Click in the **Comp Rate** field.
25.	Click the X in the **Comp Rate** field to clear it.
26.	Enter the desired information into the **Comp Rate** field. Enter "**4300**".
27.	Don't forget to click the **Calculate Compensation** button.
28.	Click the **Save** button, and you're done. (For now, at least.)
29.	The CAPPS system will automatically send a notification to Position Management at this point, alerting them to the changes that you just made, so that they can correct the Position Data on their side. Once they have updated the Position Data, they will contact you so that you can perform the final step in the process.
30.	Navigate back to the **Job Data** menu.
31.	Look the employee up again. Enter "**00000000089**" into the **Empl ID** field.
32.	Press **[Enter]**.
33.	DO NOT ADD a new Effective Dated row for this part of the transaction. We're still working with the same row we entered earlier.

Step	Action
34.	Remember how the label on the **Override** button changed earlier? It now says **Use Position Data**. Clicking on this button will reset the link between Position Data and Job Data that was broken when we clicked **Override**. But the button is currently disabled and can't be clicked. To complete this transaction, we need to go into **Corrections** mode, and reset that button, on the same Effective Dated row as before.
35.	Click the scrollbar.
36.	Click the **Correct History** button.
37.	The **Use Position Data** button is now available. Click the **Use Position Data** button.
38.	Click the scrollbar.
39.	Click the **Save** button.
40.	Your update has been saved, and your Position and Job Data are back in sync.
41.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Entering Merit Increases and Equity Adjustments

Section 3 Exercises, Lesson 4: Entering Merit Increases or Equity Adjustments

Merit Increases and Equity Adjustments are entered in the system by creating a new Effective Dated row for the change.

CAPPS allows you to make future-dated and retroactive transactions by entering an Effective Date on a new row. It is very important to understand the impact those changes might have, especially when entering retroactive changes. CAPPS edits allow for a retroactive transaction when the date is in the current calendar month or one calendar month in the past. If the retroactive change is valid past that timeframe, then a Letter of Authorization for Data Change must be submitted.

Future or current-dated changes are preferred, as they ensure that the changes are made in a timely manner and allow for better planning.

Procedure

CAPPS allows you to make future-dated and retroactive transactions by entering an Effective Date on a new row.

This lesson will demonstrate how to enter a Merit Increase or Equity Adjustment for a past or future date.

Step	Action
1.	Begin by navigating to the **Job Data** page. The Navigation is: **Main Menu > Workforce Administration > Job Information > Job Data.** Click the **Job Data** menu.
2.	We need to enter a Merit Increase for one employee and an Equity Adjustment for another. The first should have taken effect on March 1, and the second will take effect on May 1. (For this scenario, that's in the future.) Enter the Empl ID for the first employee into the **Empl ID** field. Enter "**00000000016**".
3.	The Job Data page for the first employee is displayed. Click the **Add a new row (Alt+7)** button.
4.	The **Effective Date** for this entry is **March 1, 2015.** Click the **Choose a date (Alt+5)** button.
5.	Click the **1** link.
6.	The **Effective Date** is displayed. Next, select the **Action** and **Reason** codes for the entry. Click the **Action** list.

Step	Action
7.	Select **Pay Rate Change**.
8.	Click the **Look up Reason Code (Alt+5)** button.
9.	Notice the **Reason Code** list. The reason code for a **Merit Increase** is **025,** and the reason code for an **Equity Adjustment** is **040.**
10.	Click the **Merit Increase** link.
11.	The **Action** and **Reason Code** are set. Click the **Salary Plan** tab.
12.	Note the **Salary Plan** and **Grade** (A-06). Click the **Compensation** tab.
13.	Be sure that the new compensation rate falls within the range for the **Plan** and **Grade** seen on the previous slide. In FY15, the range for A-06 is $1725.50 - $2457.00 monthly.
14.	Changes to the **Compensation Rate** can be made by entering a dollar amount, or by entering a percentage. If you want to enter a flat dollar amount, you would use the **Comp Rate** field.
15.	A **Change Percent** field is available on the **Change** tab. Click the **Changes** link.
16.	Click in the **Change Percent** field.
17.	This employee is going to receive a 5% raise. Enter the number "**5**" into the **Change Percent** field.
18.	Press **[Tab]**.

Step	Action
19.	Click the **Calculate Compensation** button to calculate the **Change Amount**.
20.	The monthly change to the employee's salary will be $87.95.
21.	Click the **Save** button.
22.	This message window appears to remind you about important agency policies regarding merit increases. Click the **OK** button.
23.	If a Salary Change is made after payroll has processed, you will see this **Warning** message. This is a reminder that you will need to contact Payroll to ensure that the employee's retroactive increase gets paid correctly. Click the **OK** button.
24.	This retroactive Merit Increase has now been entered, and will be reflected in the employee's next paycheck. Now let's enter the future-dated Equity Adjustment for the second employee.
25.	There are two ways to get back to the **Job Data Search** page from here. One way is to click **Job Data** in the breadcrumb trail at the top of the screen.
26.	The other method is to click the **Return to Search** button at the bottom of the screen. Click the **Return to Search** button.
27.	If you select the **Return to Search** button, the **Search Criteria** field will be auto-populated with the **Empl ID** for the last person you were looking at. Click the **Clear** button to search for a different user.
28.	Enter the second employee's ID, **"00000000086"**, into the **Empl ID** field.

Step	Action
29.	Press **[Enter]**.
30.	Since you were last looking at the **Compensation** tab before you clicked **Return to Search**, the system returns you to that tab for the new user. This saves some clicking if you are looking at the same information for multiple employees. Click the **Work Location** tab.
31.	Enter a new row for the Equity Adjustment. Click the **Add a new row (Alt+7)** button.
32.	The **Effective Date** for this increase will be May 1, 2015. Click the **Choose a date (Alt+5)** button.
33.	Open the month list.
34.	Select **May.**
35.	Click the **1** link.
36.	The **Effective Date** is displayed. Now we will select the appropriate **Action** and **Reason Code**. Click the **Action** list.
37.	Select **Pay Rate Change**.
38.	Click the **Look up Reason Code (Alt+5)** button.
39.	Click the **Equity Adjustment Pay** link.
40.	Click the **Salary Plan** tab.

Step	Action
41.	Note the **Plan** and **Grade** for this position, which is A-05.
42.	Click the **Compensation** tab.
43.	Click in the **Comp Rate** field.
44.	Click the **X** in the **Comp Rate** field to clear out the current value.
45.	Remember that the new Compensation Rate must fall within the range for this position's Salary Plan and Grade, A-05. For 2015, that range is $1648.08 to $2344.75 monthly. Enter the new rate, "**1950**", into the **Comp Rate** field.
46.	Click the **Calculate Compensation** button.
47.	Click the **Save** button.
48.	Remember to watch for this indicator that your file has saved successfully. If you do not see this message, there may have been an error that prevented your change from being processed. The **Saved** bubble only appears briefly, and then goes away.
49.	Click the **Home** link.
50.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Labor Relations

Section 4: Labor Relations

Objectives:

- Learn how to record a Disciplinary Action
- Learn how to record a Grievance

Please note that this training is specific to the CAPPS Human Resources system, and only covers the part of business processes that are performed in the system. Some processes may be affected by outside process steps, documentation requirements, or Agency-specific policies and procedures that are not covered in this training.

Recording Disciplinary Actions

Section 4 Exercises, Lesson 1: Recording Disciplinary Actions

When a formal disciplinary action has been taken, the specific process steps involved can be tracked in CAPPS HR - Labor Administration.

This functionality may be used at the Agency's discretion.

Procedure

When a formal disciplinary action has been taken, the specific process steps involved can be tracked in Labor Administration.

This lesson will demonstrate how the Disciplinary Action can be tracked, should the Agency decided to track the action in CAPPS.

Step	Action
1.	Begin by navigating to the **Record Disciplinary Actions** page. The Navigation is: **Main Menu** > **Workforce Administration** > **Labor Administration** > **Record Disciplinary Actions.**
2.	Enter all or part of the employee's ID, "**00087**", into the **Empl ID** field.
3.	Click the **Search** button.

Step	Action
4.	Click the **00000876130** link.
5.	The **Disciplinary Action** page for the selected employee is displayed. The first tab contains information about the cause for the Disciplinary Action. Click the **Look up Type (Alt+5)** button.
6.	Select the appropriate **Disciplinary Type** from the list. Click the **Work Rule Violation** link.
7.	The Reported Date defaults to the current date, but can be changed if necessary.
8.	Click in the **Description** field.
9.	In the Description field, briefly describe the behavior that is involved in this Disciplinary Action. For this example, press **<Enter>** and the description will be entered for you.
10.	Click the **Look up Supervisor ID (Alt+5)** button.
11.	Click in the **Last Name** field.
12.	Enter the Supervisor's last name into the **Last Name** field. Enter "**worker**".
13.	Click the **Look Up** button.
14.	Click the **000061245** link.
15.	Click the **Action Taken** tab.

Step	Action
16.	The second tab describes the Disciplinary Action being taken. Click the **Look up Disciplinary Step (Alt+5)** button.
17.	Click the **2nd Level Reminder** link.
18.	Click the **Look up Step Resolution (Alt+5)** button.
19.	When the step has been resolved, you can record that here. For now, click the **Cancel** button.
20.	Click in the **Discussed With** field.
21.	Enter the name of the person who discussed this action with the employee. Enter "**HR, Representative**" into the **Discussed With** field.
22.	Click in the **Comment** field.
23.	Enter any comments about the discussion in the **Comment** field. For this example, press <Enter> and the comment will be entered for you.
24.	Click the **Disciplinary Resolution** tab.
25.	When the action is resolved, the resolution can be entered on the third tab. For now, click the **Save** button to save your work.
26.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Recording a Grievance

Section 4 Exercises, Lesson 2: Recording a Grievance

When an employee has been dismissed and files a Grievance, the information about that Grievance can be tracked in CAPPS HR - Labor Administration.

This functionality may be used at the Agency's discretion.

Procedure

When an employee has been dismissed and files a Grievance, the resolution process can be tracked in **CAPPS HR - Labor Administration.**

This lesson demonstrates how that is done.

Note: Agencies may decide not to use this functionality in CAPPS.

Step	Action
1.	Begin by navigating to the **Record Grievances** page. The Navigation is: **Main Menu > Workforce Administration > Labor Administration > Record Grievances.**
2.	You can use this page to look up existing Grievance records, or begin a new one. Click the **Add a New Value** tab.
3.	The **Grievance ID** number will be automatically generated when the record is saved. Click the **Add** button.
4.	Click in the **Employee/Applicant** field.
5.	Enter the Empl ID number of the employee filing the Grievance in the **Employee/Applicant** field. Enter "**000876130**".

Step	Action
6.	The employee's name is displayed. The **Grievance Date** defaults to the current date, but can be changed if necessary.
7.	Click the **Look up Type (Alt+5)** button.
8.	Select the **Grievance Type** from the list. Click the **Dismissal** link.
9.	Click in the **Description** field.
10.	Enter a description of the Grievance in this field. For this example, press **<Enter>** and the description will be entered for you.
11.	Click the **Grievance Steps** tab.
12.	The **Grievance Steps** tab allows you to track the steps that are taken to resolve this grievance. Click the **Look up Grievance Step (Alt+5)** button.
13.	This is the first entry for a Grievance that has just been received. As you can see from this list, each step in the Grievance process can be tracked. Click the **Receive Grievance** link.
14.	Click the **Grievance Resolution** link.
15.	When (or if) the Grievance is finally resolved, the resolution and comments can be entered on this tab.
16.	Click the **Grievance** tab.
17.	Click the **Save** button.

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

HR Reports

Section 5: HR Queries & Reports

Objectives:

- Learn how to view HR Queries
- Learn how to create Run Controls
- Learn how to use Run Controls to run a report

Running a Query

Section 5 Exercises, Lesson 1: Running a Query

A query is a simple pre-defined reporting process that can be run to retrieve data from the CAPPS tables. A variety of queries are available to most users.

Unlike Reports, parameters for some queries may be predetermined rather than being selected when the query is run. However, a query can be run in Excel format, where the data can be sorted, filtered, and repurposed as needed.

Procedure

A query is a simple pre-defined reporting process that can be run to retrieve data from the CAPPS tables. A variety of queries are available to most users. Some allow parameters to be entered to filter data, and others do not.

This lesson will demonstrate how to select and run a query from the list provided.

Step	Action
1.	Begin by navigating to the **Query Viewer** page. The Navigation is: **Main Menu** > **Reporting Tools** > **Query** > **Query Viewer.**
2.	To see a full list of the available queries, click the search button without entering any parameters. Click the **Search** button.

Step	Action
3.	The entire list of queries is displayed. Let's narrow it down a bit. At the top of the **Search Results** is a dropdown list that divides the queries into folders. Click the **Folder View** list.
4.	Select the folder that will display only the HR reports. Click the **HR** list item.
5.	Notice that all of the queries in this folder start with "TX_HR". In the future, you could type **"TX_HR"** in the **Search By** field to skip to this point.
6.	All of the queries in the HR folder are listed here, along with a brief description of the information they will return.
7.	By clicking on the appropriate link, you can display the results of each query in **HTML, Excel, or XML** format.
8.	You can also save it to **Favorites** if you run the same query regularly.
9.	For this example, let's look at the query titled **TX_HR_AGY_TERMS,** in Excel format.
10.	Click the **Excel** link.
11.	You can open the query on your screen, or save it for later use by clicking the appropriate button. **Note:** This step may vary, depending on your computer setup. Click the **Open** button.
12.	The results of your query are displayed in an Excel spreadsheet.
13.	The query results opened in a new window. Click the **Close** button to return to CAPPS.

Step	Action
14.	If you use the same report on a regular basis, you can add it to your list of Favorites to make it more easily accessible next time. Click the **Favorite** link.
15.	When you have queries marked as Favorites, the list appears at the bottom of the screen.
16.	If there is a long list on the screen, your **Favorites** will still appear at the bottom, so you may need to scroll to find them. Let's go back to the full list, to see how we will find our list of **Favorites.** Click the **Folder View** list.
17.	Click the **All Folders** list item.
18.	Scroll down to the bottom to find your **Favorites** list. Click the scrollbar.
19.	Here it is, at the bottom of the screen below the main list.
20.	Click the scrollbar.
21.	Next time you visit the **Query Viewer,** your **Favorites** list will appear on the initial search screen. Click the **Main Menu**.
22.	Navigate to the **Query Viewer**, as before. The Navigation is: **Main Menu** > **Reporting Tools** > **Query** > **Query Viewer.**
23.	Your **Favorites** are already listed at the bottom of the page, so you can run your favorite queries without searching for them. Click the **Excel** link.
24.	Click the **Open** button.

Step	Action
25.	Click the **Close** button.
26.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Running an HR Report

Section 5 Exercises, Lesson 2: Running an HR Report

HR Reports are run by means of a Run Control, which is a defined set of parameters that can be saved for future use. These parameter sets are created and saved, and then can be reused as needed to ensure that the report runs consistently each time, or can be changed to meet the current requirements.

Procedure

Reports are run by means of a Run Control, which is a set of parameters that are saved for future use.

In this lesson we will run the Notification of Termination Report, which provides garnishment information for terminated employees.

Please note that the purpose of this lesson is to demonstrate the process of running a report, and does not focus on the content of any specific report. Your access to specific reports depends on the security roles assigned to you.

Step	Action
1.	Begin by navigating to the **Notification of Termination** report. The Navigation is: **Main Menu** > **Workforce Administration** > **CAPPS Reports** > **Notification of Termination.** Click the **Notification of Termination** menu.
2.	The first time you run a report, you will need to set up a **Run Control,** which is a set of parameters used to run a report. Click the **Add a New Value** tab.

Step	Action
3.	Click in the **Run Control ID** field.
4.	Give your Run Control a name that will identify this report for future reference. **Note:** You will only have access to your own Run Controls, so you do not need to include your name or initials. Enter "**TermRpt**" into the **Run Control ID** field.
5.	Click the **Add** button.
6.	Now set up the parameters for this **Run Control.** The first parameter is the date range. Click the **Choose a date (Alt+5)** button.
7.	We want to see information about all terminations for the past year, which is the period of March 17, 2014 to March 17, 2015. Open the Month list.
8.	Click the **2014** list item.
9.	Click the **17** link.
10.	Click the **Choose a date (Alt+5)** button.
11.	Today is March 17, 2015, so you can use the Current Date link to insert that date. Click the **Current Date** link.
12.	Next, select the **Company** to be included in the report. Click the **Look up Company (Alt+5)** button.

Step	Action
13.	Click the **T32** link.
14.	When you have your parameters set, you can save this **Run Control** for future use. Click the **Save** button.
15.	You could go ahead and run this now. But first, let's take a look at how you would find a saved **Run Control.** Click the **Notification of Termination** menu to go back to the start.
16.	Instead of **Adding a New Value**, this time we're going to **Find an Existing Value.** Click the **Search** button to see a list of all Run **Controls** you have saved.
17.	You have created three Run Controls to date, and they are all listed here. Click the **TermRpt** link to run the one you created in this lesson.
18.	This brings us back to the same **Parameters** window we were in before. The values you set up and saved in your **Run Control** are pre-filled for you. You can change these values, or you can run the report as shown.
19.	Click the **Run** button.
20.	A report may contain more than one process, as shown here. One process is the Report and the other is the associated Letters. Select either or both, depending on your need. Click the **Select** option.
21.	Click the **Select** option.
22.	Click the **OK** button.

Step	Action
23.	Reports run in the background, so that you can continue working while they run. Your report, reports requested by everyone else in the system, and all of the other processes that the system requires are put into a queue, and run according to the priority of the request and the capacity of the processors. Generally, this happens pretty quickly, but sometimes you may need to be patient. Click the **Process Monitor** link.
24.	The **Process Monitor** lists your recent requests, both current and past, and allows you to see their status and view the results when they are complete. The most recent requests are on top. As you can see, one of your reports has completed successfully, and the other is still processing.
25.	**Note:** This screen is not live, and that status will not update automatically, no matter how long you watch it...
26.	After waiting a few seconds or minutes, update the screen by clicking the **Refresh** button.
27.	It's still processing. Click the **Refresh** button again.
28.	Ok, now it's done! Let's take a look at the results. Click the **Details** link.
29.	The **Process Detail** screen shows information about the process that just completed. The report we're looking for is part of the **Log.** Click the **View Log/Trace** link.
30.	The default file format is .pdf, so find the file name that ends with that extension, and click on it. Click the **txtrmrpt_5492421.PDF** link.

Step	Action
31.	This is what the Terminated Employees report looks like. It lists Terminated Employees who are being garnished for Child Support, Spousal Support, and Student Loan Repayments. Each type of garnishment has its own page. This page shows Child Support. Click the **Down Arrow** to see the next page.
32.	This page shows Spousal Support. Click the **Down Arrow** to see the last page.
33.	The last page shows Student Loan Repayments.
34.	The report opened in a new window, so you can close it when you're finished reviewing it. Click the **Close** button.
35.	Click the **Close current tab** button.
36.	Click the **Return** button to close the **View Log/Trace** window.
37.	Click the **OK** button to close the **Process Detail** window.
38.	What if you want to run your report again, but for a different range of dates? The **Run Control** that you set up and saved can be reused with different variables. Click the **Notification of Termination** menu to start over.
39.	On the **Find an Existing Value** tab, click in the **Run Control ID** field.
40.	Enter the name of your saved **Run Control** into the **Run Control ID** field. Enter "**TermRpt**".

Step	Action
41.	Click the **Search** button.
42.	The saved parameters are displayed, but can be changed. Let's run the report for the previous year. Click the **Choose a date (Alt+5)** button.
43.	Click the list.
44.	Click the **2013** list item.
45.	Click the **17** link.
46.	Click the **Choose a date (Alt+5)** button.
47.	Click the list.
48.	Click the **2014** list item.
49.	Click the **17** link.
50.	Click the **Run** button.
51.	Select the processes you want to run. Click the **Select** option.
52.	Click the **Select** option.
53.	Click the **OK** button.

Step	Action
54.	Now the processes are running, so let's go check on them. Click the **Process Monitor** link.
55.	Generally, the sequence of statuses will be Queued, Initiated, Processing, and Success. If the process runs quickly, though, you may not see all of these.
56.	Click the **Refresh** button to update the status.
57.	Success! Our report is finished. Click the **Details** link.
58.	Remember that our results are in the **Log**... Click the **View Log/Trace** link.
59.	...and that our output is formatted for PDF. Click the **txtrmrpt_5492425.PDF** link.
60.	Notice that the date range covered by the report is listed in the header, along with the **Company.**
61.	Click the **Close** button.
62.	Click the **Close current tab** button.
63.	Click the **Return** button.
64.	Click the **OK** button.
65.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Glossary

Business Unit

Business Unit is a business level between Company (Agency) and Department for reporting and operations.

A Business Unit value is typically the Agency Number appended with two additional characters (*e.g.,* 30400).

Company

Company is a top-level designator. It is equivalent to Agency Number.

Department

A Department in CAPPS continues to identify an operational entity within an agency. Multiple departments can be organized by Business Unit, which is essential for system security as well as position and job information.

HTML

HTML stands for HyperText Markup Language. It is a text description language used for publishing content on an internet web site.

Query

A Query is an interactive tool used to gather information or data from the CAPPS system. Queries are already formulated, and you run them when you need them. The answers are shown in a browser window; alternatively, you can download the data into an Excel spreadsheet.

Run Control ID

A Run Control ID is an identifier that, when paired with a User ID, uniquely identifies a process that is running. The Run Control ID defines parameters or criteria that are used when running the process.