

CAPPS HR/PAYROLL TRAINING

Agency Benefits Administration

Welcome to CAPPS HR/PAYROLL End-User Training (EUT)

Agency Benefits and FMLA

Course Number: 140

Course Name: Agency Benefits Administration

This course is recommended for Benefit Coordinators and FMLA Specialists

Welcome

Hello, welcome back to the CAPPS HR/Payroll training.

Before taking this class, you should have already completed the CAPPS Fundamentals course.

Introductions

Before proceeding with the course, let's take some time to get to know each other.

Tell us:

- Your name
- Your Agency and Department
- Your expectations from this session
- An interesting fact about yourself

Greetings

Before we get started, let's go over some housekeeping rules, along with a few pointers and tips that will help you complete this course.

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Housekeeping Rules

- Training Materials
- Restrooms
- Emergency Exits
- Please Silence Cell Phones
- Ask Questions

Course Preparation

Pointers and tips to remember while taking this course:

- This course will take approximately 3 1/2 hours. This course may be completed in sections, or all in one session.
- Make sure you view all the information using the Next and Prev navigation buttons.
- Close all other applications including email while taking the course.
- When displayed move your mouse over this symbol to view content “Fun Facts”.
- After successfully completing the course, there will be instructions on how to complete a knowledge check.

Course Structure

This course is organized into five (5) sections. Throughout each section, you will learn how to use CAPPS Benefits and FMLA functionality. The five sections are listed below:

- [Section 1](#) - Overview
- [Section 2](#) - Benefits Coordinators
- [Section 3](#) - Benefits – Interface Reports
- [Section 4](#) – FMLA (Refer to Job Aid)
- [Section 5](#) - Recap and Conclusion

Course Objectives

After finishing this course, you will be able to:

- Describe the benefits process
- Maintain benefits enrollment

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- Run reports and queries
- Create, approve, maintain, and track FMLA or Parental event(s)

Course Outline

- 1) Benefits Overview - 20 min
- 2) Benefits Coordinators - 60 min
- 3) Benefit Reports - 10 min
- 4) FMLA - 40 min
- 5) Recap and Conclusion - 10 min

Section 1 – Benefits Overview

After completing this section, you will be able to:

- Understand how employee data from ERS Online can be viewed in Benefits.
- Understand key terms and definitions.
- Understand how Benefits integrates with other CAPPS HR/Payroll modules.

Section 1 - Benefits & FMLA Overview

- Benefits Coordinators and Payroll users can view limited enrollment data in Base Benefits.
- Employee benefits enrollment is maintained and tracked within ERS. ERS Online sends a file daily to CAPPS HR/Payroll to update employees' benefit elections.
- FMLA eligibility is tracked in CAPPS HR/Payroll.
- FMLA activity is created, approved, managed, and closed in CAPPS HR/Payroll.
- In addition, queries and reports are available in the CAPPS HR/Payroll system.

Section 1 - Key Terms & Definitions

- Annual Enrollment - Employees Retirement System of Texas (ERS) conducts an annual open enrollment for eligible employees and retirees to make changes to their current benefits (in the Group Benefits Program and TexFlex) without a qualifying life event.
- Benefit Plan Type - A benefit category, such as Health, Dental, Life, or Savings.
- Benefit Plan Option - A specific option within a plan type. For example, there might be two or three different offerings of health coverage.
- Benefit Program - A collection of benefits offered to State employees.

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- Employee Data - Information that is recorded and maintained at the agency in order to meet organizational, local, state, or federal regulations.
- ERS - Employees Retirement System of Texas. ERS administers the benefits provided to employees by the State and your agency. ERS manages employees' insurance benefits under the Texas Employees Group Benefits Program (GBP). ERS also maintains Pension data for your agency employees.
- FMLA - The Family Medical Leave Act protects benefits and job restoration for employees who take a leave from work to care for themselves or family members.
- Time & Labor (T&L) - A module within CAPPS HR/Payroll used for managing, planning, reporting, and approving an employee's time. T&L integrates with and uses data from both Payroll and Base Benefits modules.
- TRC - Time Reporting Codes, used by employees and managers to manually input FMLA time in the T&L module.

CAPPS Module Overview

The CAPPS HR/Payroll is comprised of several integrated applications known as modules. These modules are used to manage employee and human resource functions.

The central module in this integration is Human Resources. The Human Resources module contains key personal and job-related information that is shared by the other modules within CAPPS. The additional core modules for this phase include Position Management, Time and Labor, Payroll and Base Benefits. The additional non-core modules are Recruiting, Learning and Performance Management.

- The focus of this training is Benefits Administration and FMLA processing.
- Base Benefits is updated by ERS Interface files and the Benefit information flows to and from CAPPS HR/Payroll.

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Section 2 - Benefit Coordinators

After completing this section, you will be able to:

- View an employee's record of assignment to a benefit program (e.g., full time benefits = EFT).
- View an employee's record of benefit elections, such as Health Insurance, Dental Insurance, or Retirement Plans.

Benefits of New Process:

Internal Administration

- ERS Online is the system of record for an employee's benefit plans and elections. ERS sends a daily update to CAPPS HR/Payroll with changes and new elections.
- The integration between ERS Online and CAPPS HR/Payroll is seamless. Inbound files (such as enrollment data, benefit election changes, TexFlex, and TexaSaver) are automated, so administration is easier.

Consistency

- CAPPS HR/Payroll provides a consistent, streamlined method for viewing benefit enrollment.

Maintenance

- CAPPS HR/Payroll provides easy-to-view summaries of coverage on Benefits pages.

Employee benefits enrollment is maintained and tracked in ERS Online. Integration between ERS Online and CAPPS HR/Payroll enables benefit processing using Payroll.

Benefits Coordinators have view access to Benefits Configuration and Employee Enrollment.

Benefits Coordinators must work with Payroll Specialists to make one-time payroll adjustments for payroll processing as needed.

Responsibilities of Benefits Coordinator

The Benefits Coordinator is responsible for:

- Validating and reconciling employee enrollment data loaded from ERS into CAPPS HR/Payroll
- Running various Benefits-related reports as needed

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Section 2 - Exercises

Exercises

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Benefits Coordinators

Lesson 1: Benefit Program Assignment

Lesson 2: View an Employee's Plan(s)

Lesson 3: Current Benefits Summary

[View Section 2, Lessons 1-3 exercise scenarios \(opens a new web browser\)](#)

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

Section 3 - Benefit Interface Reports

Objectives

After completing this section, you will be able to:

- View the inquiry pages for benefit-related data
- Generate and view benefit-related reports

Reports Available in CAPPS HR/Payroll

- **Benefits HIR/REH Report:** An ad hoc report used to assist benefit coordinators with information used to create an enrollment event on ERS Online.
- **Pay Impacting forms for MON Report:** An ad hoc monthly report designed to display various late ERS inbound interface benefits elections, changes and waive conditions after payroll has been confirmed, (ex. a New Hire).
- **ERS Inbound Report:** A daily report providing benefit updates from ERS Online to the CAPPS HR/Payroll system.
- **ERS/CAPPS Insurance Reconciliation:** A monthly report showing the differences between ERS Online and CAPPS HR/Payroll. Users will use this report for

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reconciliation and payroll adjustments.

- TX FMLA/PRNTL History Report: An ad hoc report showing FMLA events and corresponding history by employee or agency.
- TX FMLA ER Insurance Report: An ad hoc report showing employees on FMLA with no pay for an entire month, who should receive a state contribution.

Section 3 - Exercises

Exercise

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Benefits – Interface Reports

Scenario 1: Benefits HIR/REH

Scenario 2: Texas Saver

Scenario 3: ERS Inbound

Scenario 4: ERS/CAPPS Reconciliation

[View Section 3, Exercise Scenarios 1 – 4 \(opens a new web browser\).](#)

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

Section 4 – FMLA

(DO NOT USE THIS SECTION. REFER TO JOB AID)

Objectives

After completing this section, you will be able to:

- Create an FMLA Event
- Track multiple FMLA Plan IDs
- Check an employee's eligibility for FMLA event and approve
- Generate and view FMLA-related reports and queries

Family Medical Leave Act (FMLA)

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- The Family Medical Leave Act (FMLA) is a federal regulation that protects employees' benefits and jobs when they need to take a leave from work to care for themselves or for family members.
- The FMLA module in CAPPS HR/Payroll supports administering an FMLA Event by allowing the creation and approval (or denial) of the event, checking the eligibility of an employee for FMLA or Parental leave, tracking the leave, and eventually closing the event when the employee returns to work.
- Time & Labor integration: Either the Employee, the Manager, or a T&L Super User must input time into the Timesheet and will use the FMLA Request ID number to "link" the leave time taken with the FMLA Event.
- Depending on your agency, the FMLA 12-month period can be on a Fiscal Year, Rolling Forward, Rolling Backward, or Calendar Year basis.

Checking for Eligibility

- At Go-Live, CAPPS will not have complete data for historical hours worked. FMLA Coordinators can run a Query in CAPPS to determine whether an Agency employee is eligible for FMLA.
- The query is available through the CAPPS HR/Payroll system, and is named TX_HR_AGY_FMLA_ELIG_HRS. The query provides the historical data needed to determine an employee's eligibility for an FMLA event.
- The total hours must be entered into the Non-CAPPS FMLA Earned Hours field when creating the event.

Section 4 - Exercises

Exercise

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

FMLA

Lesson 1: FMLA Query for Eligibility

Lesson 2: FMLA Activity

[View Section 4: Lesson 1 – 2 exercise scenarios \(opens a new web browser\).](#)

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

Section 5 – Summary & Conclusion

Summary

You have learned the following features of Benefits Administration:

- How to describe the benefits process
- How to maintain benefits enrollment
- How to run reports and queries
- How to create, approve, maintain, and track FMLA or Parental event(s).

Conclusion

This completes the course.