EUT Course – 140

BENEFITS ADMINISTRATION

PeopleSoft 9.2

July 2016

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140 Benefits Administration (Benefits and FMLA)

Base Benefits is used to view employee benefits in the CAPPS HR/Payroll system.

CAPPS receives data from **ERS OnLine** through a daily interface. ERS is the system of record for an employee's benefit plans and benefit selections. The choices made in ERS OnLine will appear in Base Benefits in the CAPPS HR/Payroll system. Base Benefits integrates fully with CAPPS HR/Payroll.

In addition to Base Benefits, CAPPS HR/Payroll will track and maintain FMLA-related activity.

After finishing this course, you will be able to:

- Describe the benefits process.
- Maintain benefits enrollment.
- Run reports and queries.
- Create, approve, maintain, and track FMLA or Parental Leave event(s).

Section 1. Overview

Section 1. Overview

There are no exercises in Section 1.

Section 2. Benefits Coordinators

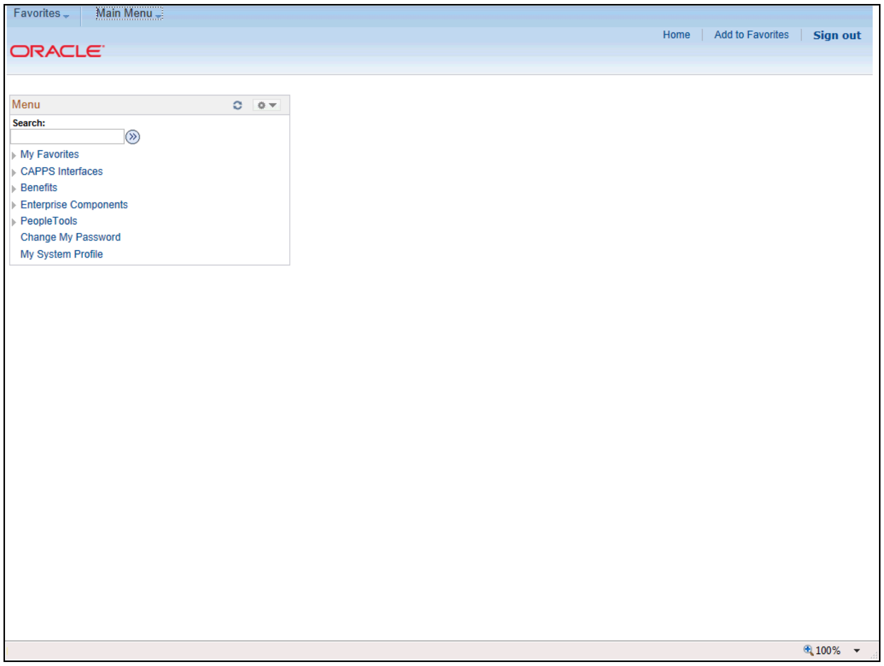
Section 2. Benefits Coordinators

Benefit Program Assignment

Section 2. Lesson 1. Benefit Program Assignment

Procedure

This lesson shows you how to view the **Benefit Program Assignment** page in CAPPS HR/Payroll.



Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Benefits** menu. Benefits
3.	Click the **Enroll In Benefits** menu. Enroll In Benefits
4.	Click the **Assign to Benefit Program** item. Assign to Benefit Program
5.	In the **CAPPS Fundamentals** class, you learned that the '**%**' character is a wildcard. You are looking up **Empl ID** (Employee ID) containing '**47**.' Enter "**%47**" into the **Empl ID** field. Empl ID: begins with
6.	Click the **Include History** option. Include History
7.	Click the **Search** button. Search

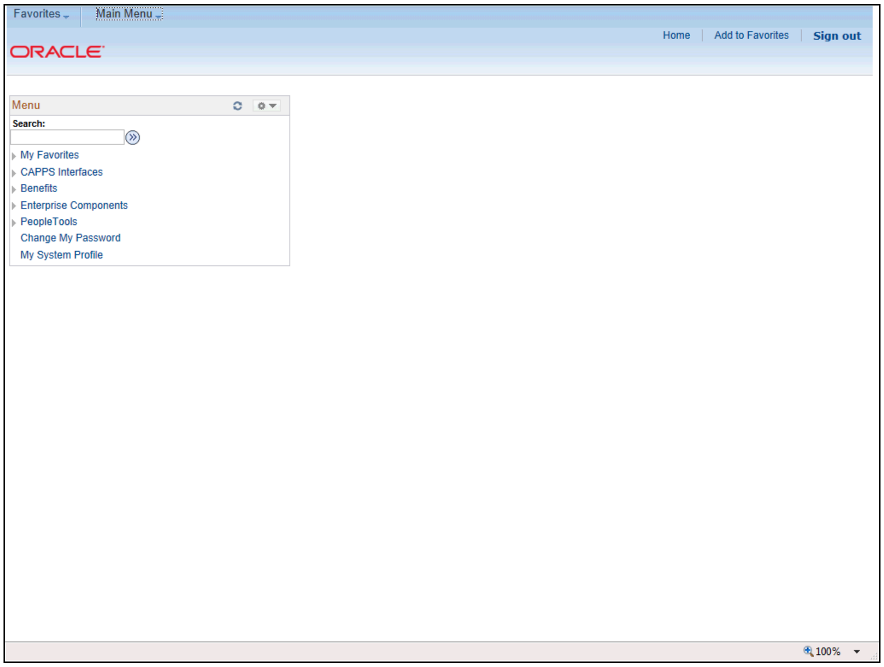
Step	Action
8.	Click the **Test Employee ZZ** link. Test Employee ZZ
9.	On the **Assign to Benefit Program** page, you are able to view the Benefit Program to which the employee is assigned. This data automatically populates when the employee is hired (onboarded) into CAPPS.
10.	Any changes after hire to the employee's FTE will automatically update the Benefit Program in CAPPS. Benefits Coordinators must ensure that ERS OnLine is updated to reflect any changes after hire.
11.	**NOTE:** Benefits Coordinators ***must*** ***<u>manually</u>*** update **ERS OnLine** for changes to an employee's Benefit Program. The two systems (**CAPPS HR/Payroll** and **ERS OnLine**) must remain in sync. This is so that premiums are appropriately reflected in both systems. Certain benefit premiums are calculated based on the Benefit Program established in ERS and CAPPS. Changes can affect the cost of those premiums.
12.	Click the **Look up Benefit Program** button.
13.	Benefit Programs available to agency employees include **EFT** for Full Time Benefits, or **EPT** for Part Time Benefits. Please note that **PSX** is used for Board Members. **EFN** and **EPN** do not apply to most agencies.
14.	Typically, you would never make changes to the Benefit Program in Benefits, since salary transactions processed in Job Data update the Benefits Program in the CAPPS HR/Payroll system. **Note:** A change to the Benefit Program in CAPPS must be manually updated in ERS OnLine. Click the **Cancel** button. Cancel
15.	Click the **Home** link. Home
16.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

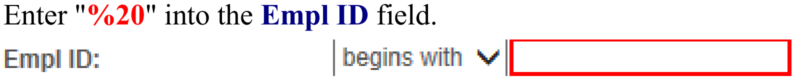
View an Employee's Plan(s)

Section 2. Lesson 2. View an Employee's Plan(s)

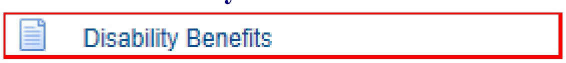
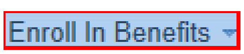
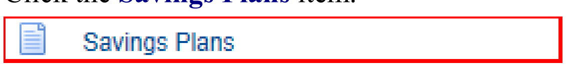
Procedure

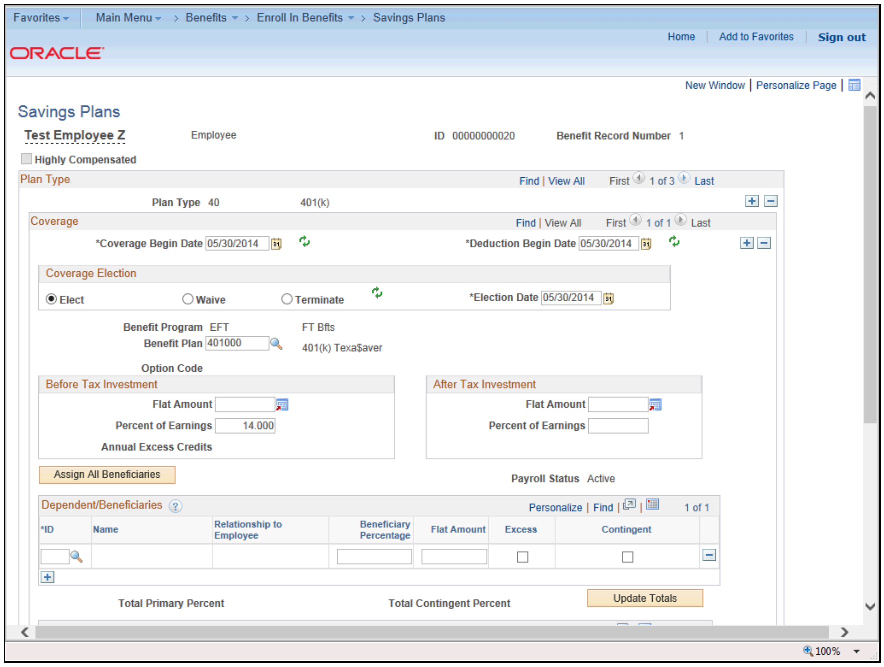
This lesson shows you how to view an employee's Benefit Plan(s). You can make changes, if necessary.



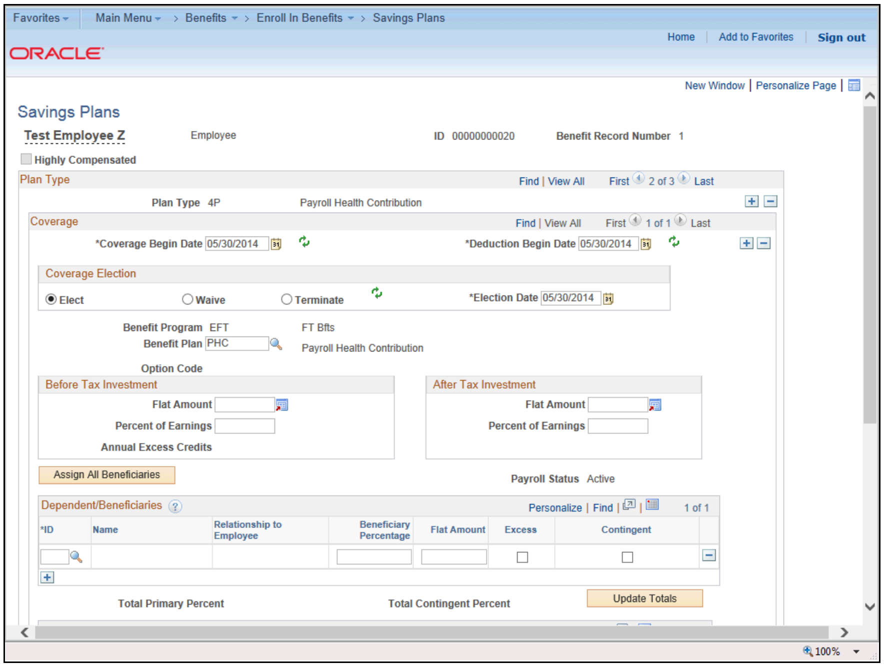
Step	Action
1.	Click the **Main Menu** button. 
2.	Click the **Benefits** menu. 
3.	Click the **Enroll In Benefits** menu. 
4.	Click the **Health Benefits** item. 
5.	In the **CAPPS Fundamentals** class, you learned that the '**%**' character is a wildcard. You are looking up **Empl ID** (Employee ID) that contains '**20**.' Enter "**%20**" into the **Empl ID** field. 

Step	Action
6.	Click the **Include History** option. Include History
7.	Click the **Search** button. Search
8.	The system retrieves six (6) records, each of which has the characters '**20**' somewhere in the **Empl ID** (Employee ID). You are looking up Test Employee Z. Click the **00000000020** link. 00000000020
9.	This employee has 3 Health Benefits plans. This first row shows the Medical Plan (**Plan Type 10**) information.
10.	Click the **Show next row** button.
11.	The second row shows Dental plan information (**Plan Type 11**). Click the **Show next row** button.
12.	The third row shows **Plan Type 1T**, Medical Tobacco Premium, which is for smokers. Notice that the Coverage Election is **Waive**d. This employee is not a smoker.
13.	Click the **Enroll In Benefits** button. Enroll In Benefits
14.	In a similar manner, you can look up other Benefit Plans for this employee. Let's walk through these Plans.
15.	Click the **Life and AD/D Benefits** item. Life and AD/D Benefits
16.	There are 4 rows of data for this employee's **Life and AD/D** (Accidental Death and Dismemberment) **Benefits**. Row 1 shows the employee's Basic Life coverage. Click the **Show next row** button.

Step	Action
17.	Row 2 is the Supplemental Life coverage. Click the **Show next row** button. 
18.	Row 3 is AD and D. Click the **Show next row** button. 
19.	Row 4 is Dependent Life.
20.	Click the **Enroll In Benefits** button. 
21.	Click the **Disability Benefits** item. 
22.	This employee has 2 rows of data for **Disability Benefits**. Row 1 is Short-Term Disability. Click the **Show next row** button. 
23.	Row 2 shows Long-Term Disability coverage, which has been waived. Click the **Enroll In Benefits** button. 
24.	Click the **Savings Plans** item. 



Step	Action
25.	For **Savings Plans**, for this employee, Row 1 shows 401(k) information. Click the **Show next row** button. 



Step	Action
26.	Row 2 shows Payroll Health Contribution. Click the **Show next row** button.
27.	Row 3 shows PHC Offset to STH. Click the **Enroll In Benefits** button. Enroll In Benefits
28.	Click the **Savings Management** item. Savings Management
29.	Note that this employee does not have any Savings Management entries. Click the **Enroll In Benefits** button. Enroll In Benefits
30.	Click the **Spending Accounts** item. Spending Accounts
31.	This employee is not enrolled in any Spending Accounts.

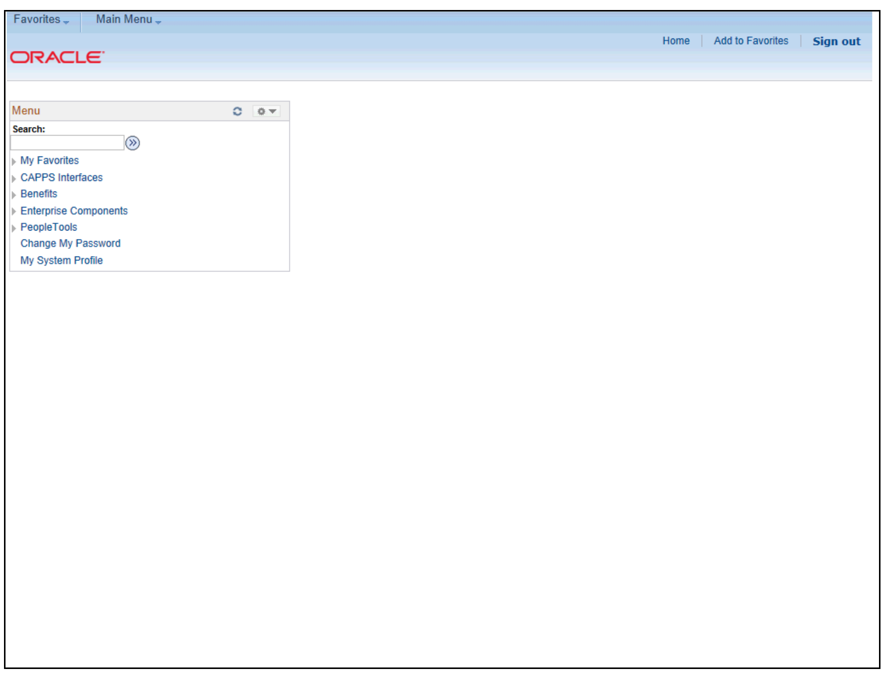
Step	Action
32.	Click the **Enroll In Benefits** button. Enroll In Benefits
33.	Click the **Retirement Plans** item. Retirement Plans
34.	This employee is enrolled in the ERS Retirement Plan, **Plan Type 70**, PERS. Agencies may see additional retirement plans that are not applicable to their agency.
35.	Click the **Home** link. Home
36.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Current Benefits Summary

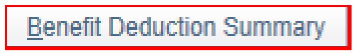
Section 2. Lesson 3. Current Benefits Summary

Procedure

This lesson shows you how to use the **Current Benefits Summary** page in CAPPS HR/Payroll.



Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Benefits** menu. Benefits
3.	Click the **Review Employee Benefits** menu. Review Employee Benefits
4.	Click the **Current Benefits Summary** menu. Current Benefits Summary
5.	In the **CAPPS Fundamentals** class, you learned that the '**%**' character is a wildcard. You are looking up **Empl ID** (Employee ID) that contains '**00**.' Enter "**%00**" into the **Empl ID** field. Empl ID: begins with
6.	Click the **Search** button. Search
7.	Click the **00000000001** link. 00000000001
8.	The **Current Benefits Summary** page has two tabs. The first tab, **Benefit Enrollment Summary**, shows the Current Enrollments for this employee.
9.	Click the **Benefit Deduction Summary** tab. Benefit Deduction Summary
10.	The second tab, **Benefit Deduction Summary**, shows the most recent pay period's deductions for those enrollments.
11.	Click the **Benefit Enrollment Summary** tab. Benefit Enrollment Summary
12.	You can easily view the next employee from your Search Results. Click the **Next in List** button. Next in List
13.	This employee has more Current Enrollments than the previous employee, so you must scroll down to see all the data.
14.	Click the **Vertical Scrollbar** to scroll down the page.

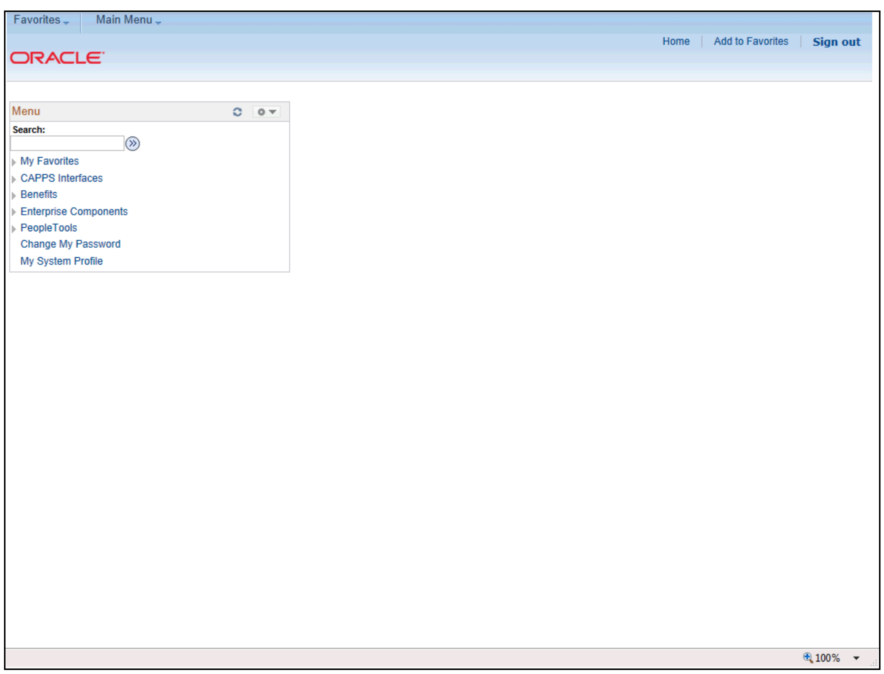
Step	Action
15.	Payroll Health Contribution (PHC) is an agency funded contribution to the health insurance fund and is required for all employees who have a state paid health insurance contributions.
16.	Click the **Vertical Scrollbar** to scroll up the page.
17.	Click the **Benefit Deduction Summary** tab. 
18.	The **Current Benefits Summary** is an easy way to see all the benefits for an employee, as well as the most recent pay period's deductions. Click the **Home** link. 
19.	Congratulations! You have succesfully completed this lesson. **End of Procedure.**

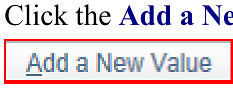
Reports from CAPPS Interfaces

Section 2. Lesson 4. Reports from CAPPS Interfaces

Procedure

This lesson shows you how to run reports from CAPPS Interfaces.

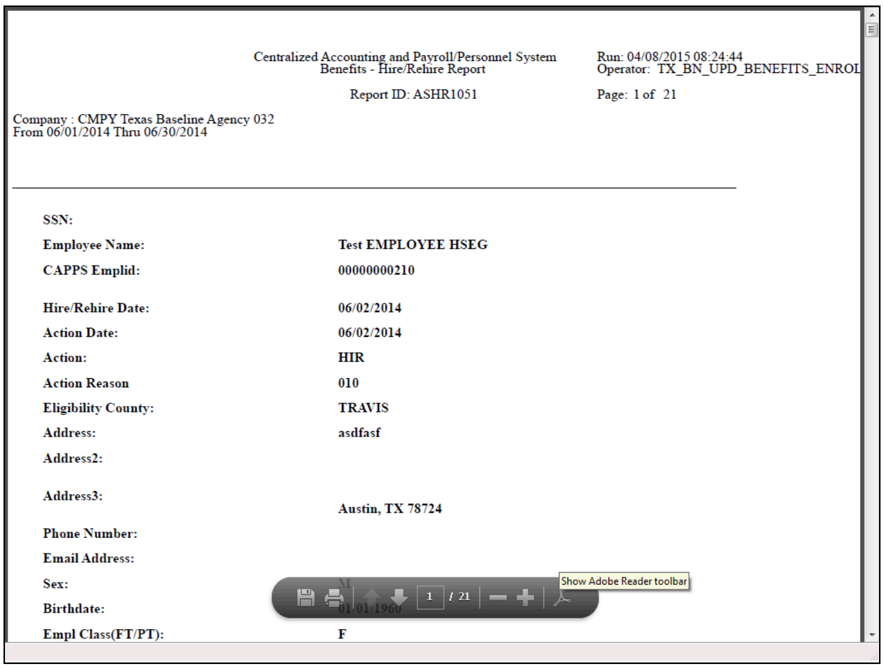


Step	Action
1.	In this example, we will show you how to set up a **Run Control ID** to run a report in CAPPS HR/Payroll. Click the **Main Menu** button. 
2.	Click the **CAPPS Interfaces** menu. 
3.	Click the **Benefits** menu. 
4.	Click the **Reports** menu. 
5.	Click the **Benefits HIR/REH Report** item. 
6.	**Run Control IDs** are used to run system processes. A **Run Control ID** is an identifier that, along with your User ID, uniquely identifies the process you are running. The Run Control ID provides information used when the process is run. This means that when a process runs in the background, the system does not prompt you for additional values. In other words, you provide the answers before the system asks the questions.
7.	**Note:** A **Run Control ID** cannot contain spaces. It is OK to use the underscore ('_') character. Whenever you Add a New Value, be consistent in your naming: use all caps, or use mixed case, or use all lower case, all the time.
8.	If you have set up a Run Control ID, you can search for it using **Find an Existing Value**. On the other hand, if this is the first time you are running this particular process, you will **Add a New Value**.
9.	Creating a Run Control ID with a name relevant to the process and meaningful to you may help to recall it when you run this process again. Remember to be consistent in your naming: use all caps, or use mixed case, or use all lower case, all the time.
10.	Click the **Add a New Value** tab. 

Step	Action
11.	For this example, you will create a Run Control ID of "HIRE_REHIRE_REPORT." Your Run Control IDs are stored by your **User ID**. No one else in the system sees *your* Run Control IDs. Enter "**HIRE_REHIRE_REPORT**" into the **Run Control ID** field. Run Control ID:
12.	Click the **Add** button. Add
13.	Use the **Benefits HIR/REH** page to enter paramaters for this *Process*, and then **Run** it. Enter "**T32**" into the **Company** field. *Company
14.	**From Date** and **End Date** are required fields for this report. This report is typically run on a monthly basis. Enter "**06012014**" into the **From Date** field. From Date
15.	Enter "**06302014**" into the **End Date** field. End Date
16.	You can save your information in one of two ways: (1) You can click on **Save** and *not* run the process. (2) You can click on **Run**. The Run Control ID will be saved with the information on the screen, and the process will be run. Click the **Save** button. Save
17.	Click the **Run** button. Run
18.	Click the **OK** button. OK

Step	Action
19.	Notice that the **Process Instance** number (5492891) appears near the **Run** button. This number identifies the process you have just run; you can check its status using **Process Monitor**.
20.	Click the **Process Monitor** link. Process Monitor
21.	Use the **Process List** page to view the status of submitted process requests. You can see Instance 5492891. (When there is more than one process listed on this page, the ***most recent*** process will always be at the top of the list.)
22.	The current **Run Status** of this process is **Queued**. Possible states for Run Status include **Queued**, **Processing**, and **Success**. The process will be finished when the **Run Status = Success**, and the **Distribution Status = Posted**.
23.	Continue to click the **Refresh** button every 30 seconds or so, until the screen shows **Success** and **Posted**. Click the **Refresh** button. Refresh
24.	**Run Status** = **Success**. **Distribution Status = Posted**. Your job is complete. You can now look at the results of the process. Click the **Details** link. Details
25.	The system opens a new modal window, **Process Detail**. Click the **View Log/Trace** link. View Log/Trace
26.	The system opens a new modal window, **View Log/Trace**. After you run a report, look for the **PDF** file in the **File List** area. Click the **ashr1051_5492891.PDF** link. ashr1051_5492891.PDF

Step	Action
27.	The system opens the PDF in a new tab (or a new window, depending on your browser settings). Hover your mouse near the bottom of this report, and Adobe Reader PDF icons will appear.



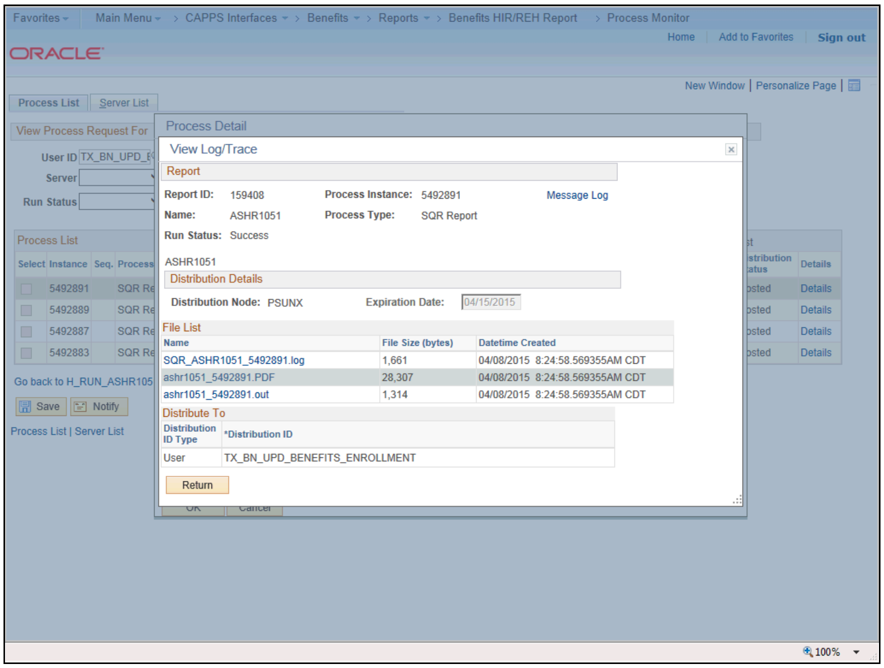
Centralized Accounting and Payroll/Personnel System
Benefits - Hire/Rehire Report
Run: 04/08/2015 08:24:44
Operator: TX_BN_UPD_BENEFITS_ENROL
Report ID: ASHR1051
Page: 1 of 21

Company : CMPY Texas Baseline Agency 032
From 06/01/2014 Thru 06/30/2014

SSN:	
Employee Name:	Test EMPLOYEE HSEG
CAPPS Emplid:	00000000210
Hire/Rehire Date:	06/02/2014
Action Date:	06/02/2014
Action:	HIR
Action Reason	010
Eligibility County:	TRAVIS
Address:	asdfasf
Address2:	
Address3:	Austin, TX 78724
Phone Number:	
Email Address:	
Sex:	M
Birthdate:	01/01/1960
Empl Class(FT/PT):	F

Step	Action
28.	Click the **Show Adobe Reader Toolbar** icon. 
29.	Use the toolbar icon to page through the report. Click the **PageDownArrow** icon to view page 2. 
30.	Click the **PageDownArrow** icon to view page 3. 

Step	Action
31.	You can save your PDF report, you can print it, and you can close this tab. Click the **Close Tab (Ctrl+W)** button.



Step	Action
32.	You are back on the **View Log/Trace** modal window. Click the **Return** button. Return
33.	The system returns you to the **Process Detail** modal window. Click the **OK** button. OK
34.	The system takes you back to the **Process Monitor** page. Click the **Go back to H_RUN_ASHR1051** link. Go back to H_RUN_ASHR1051

Step	Action
35.	You can run other reports in a similar fashion. Click the **Reports** button. Reports
36.	Click the **Pay Impacting forms for MON** menu. Pay Impacting forms for MON
37.	Enter "**PAY_IMPACT_FORMS_MON**" into the **Run Control ID** field. Run Control ID:
38.	Click the **Add** button. Add
39.	This is the **Monthly Pay Impacting Forms Report** Run Control page. This report should be run once your Monthly payroll has been completed. Like the Hire / Rehire Report, you must fill in the required fields in order to run this report. This lesson does not include an example of this report.
40.	This is the **Semi Monthly Pay Impacting Forms Report** Run Control page. **Note:** The Semi Monthly Report only applies to agencies with Semi-Monthly employees. This report should be run once your Semi-Monthly payroll has been completed. Like the Hire / Rehire Report, you must fill in the required fields in order to run this report. This lesson does not include an example of this report.
41.	Click the **Home** link. Home
42.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Section 3. Benefits - Reports

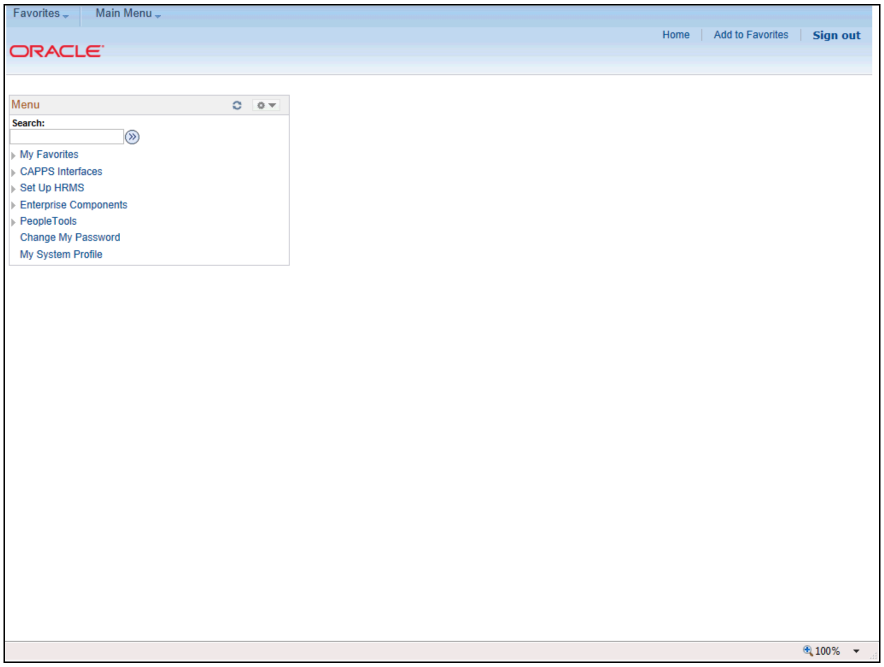
Section 3. Benefits - Reports

Benefits-related Reports in CAPPS Interfaces

Section 3. Lesson 1. Benefits-related Reports in CAPPS Interfaces

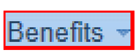
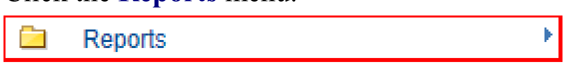
Procedure

This lesson shows you how to view various benefits-related reports in CAPPS HR/Payroll.



Step	Action
1.	Click the **Main Menu** button.
2.	Click the **CAPPS Interfaces** menu.
3.	Click the **Benefits** menu.
4.	Click the **Inquire** menu.
5.	**Note:** The inquiry for **Texas Saver Results** is only available on (or after) the third work day of the month. Click the **Texas Saver Results** menu item.

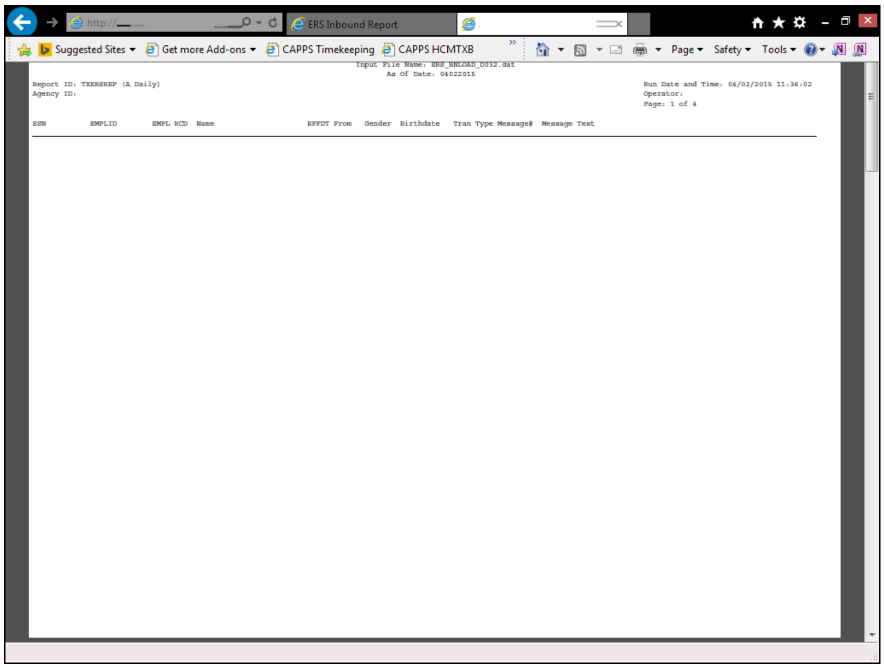
Step	Action
6.	**Texas Saver Results** is an inquiry. An inquiry is different from a report because it displays the results onscreen in real time. Enter "**032**" into the **Agency ID** field. Agency ID begins with
7.	Click the **Search** button. Search
8.	Click the **Vertical Scrollbar** to scroll down the page.
9.	Click the **Details** tab. Details
10.	The **Details** tab shows changes for employees. Legend for Texas Saver Results **Details** page: **A = Add** **P = Participant change** **C = Agency change** **S = Stop**
11.	Click the **Other Info** tab. Other Info
12.	Click the **Vertical Scrollbar** to scroll up the page.
13.	Click the **Errors** tab. Errors
14.	Click the **Details** tab. Details
15.	Click the **Horizontal Scrollbar** to scroll to the right across the page.
16.	Click the **Inquire** button. Inquire
17.	Similarly, you can view **ERS Inbound Results** directly onscreen. This, too, is an Inquiry. Click the **ERS Inbound Results** menu. ERS Inbound Results
18.	The page opens with **Overall Results**. More discrete presentations are available on each of the tabs.

Step	Action
19.	Click the **A records** tab. 
20.	The **A records** tab contains demographic data.
21.	Click the **AC records** tab. 
22.	The **AC records** tab contains enrollment data.
23.	Click the **F records** tab. 
24.	The **F records** tab contains TexFlex data; the F records data can also be found on the **AC records** tab.
25.	Click the **FA records** tab. 
26.	The **FA records** tab contains Financial Adjustments data.
27.	Click the **Message Catalog** tab. 
28.	The final tab shows you what any Messages mean.
29.	Click the **Benefits** button. 
30.	A report is run differently. You ask the system to generate the report, and you view the resulting PDF. The results are static, and are not interactive. Click the **Reports** menu. 
31.	There will be a new report for the Agencies, and it is so new that it is **not shown** in this lesson. The **CAPPS / ERS Reconciliation Report** will be used to reconcile employee benefit coverage and applicable deduction differences between ERS and CAPPS. ERS is the benefits administrator and the source data for CAPPS. After the payroll has been confirmed in CAPPS and the ERS Monthly file is loaded, the Benefits Coordinator can request the report, review the differences, and then make any adjustments in either system.

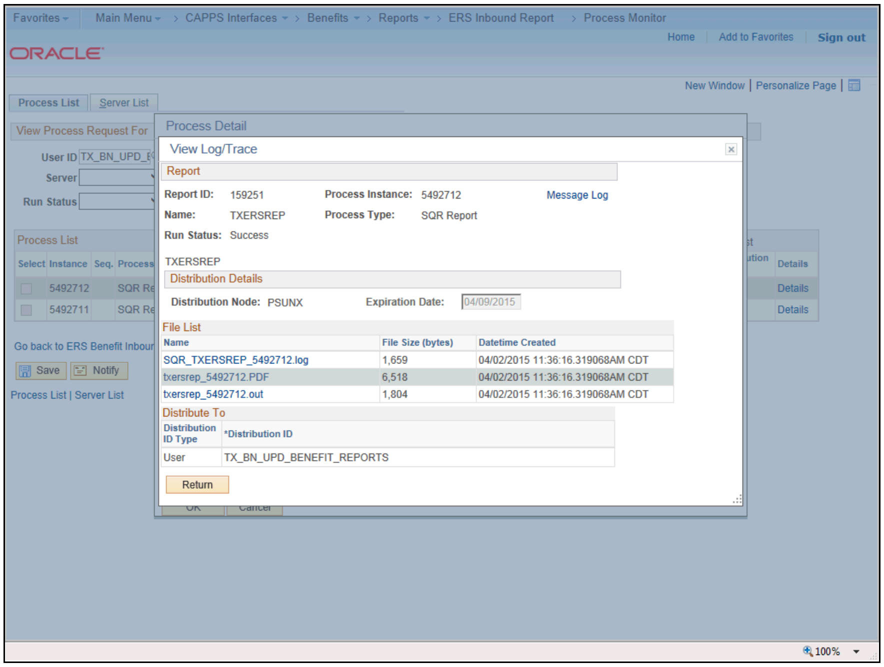
Step	Action
32.	Click the **ERS Inbound Report** menu item. ERS Inbound Report
33.	**Run Control IDs** are used to run system processes. A Run Control ID is an identifier that, along with your User ID, uniquely identifies the process you are running. The Run Control ID provides information used when the process is run. This ensures that when a process runs in the background, the system does not prompt you for additional values. In other words, you provide the answers before the system asks the questions.
34.	A **Run Control ID** cannot contain spaces. It is OK to use the underscore ('_') character. Whenever you **Add a New Value**, be consistent in your naming: use all caps, or use mixed case, or use all lower case, all the time.
35.	If you have set up a Run Control ID, you can search for it using **Find an Existing Value**. If this is the first time to run this particular process, you can **Add a New Value**.
36.	Creating a **Run Control ID** with a name relevant to the process and meaningful to you may help to recall it when you run this process again.
37.	Click the **Add a New Value** tab. Add a New Value
38.	We will create a Run Control ID of "ERS_BEN_INBOUND_RPT." The system stores your Run Control IDs by your **User ID**. No one else in the system sees *your* Run Control IDs. Enter "**ERS_BEN_INBOUND_RPT**" into the **Run Control ID** field. Run Control ID:
39.	Click the **Add** button. Add
40.	Use the **ERS Reports** page to enter paramaters for this *Process*, and then **Run** it Click the **Print A section** option. Print A section
41.	Click the **Print FA section** option. Print FA section
42.	Enter "**032**" into the **Agency ID** field.

Step	Action
43.	You can save your information in one of two ways. (1) You can click on **Save** and not run the process. (2) You can click on **Run**. The Run Control ID will be saved with the information on the screen, and the process will be run. Click the **Run** button. Run
44.	Click the **OK** button. OK
45.	Notice the **Process Instance** number (5492712) appears near the **Run** button. This number identifies the process you have just run; you can check its status using **Process Monitor**.
46.	Click the **Process Monitor** link. Process Monitor
47.	Use the **Process List** page to view the status of submitted process requests. You can see Instance 5492712 at the top of the list.
48.	The current **Run Status** of your process is **Queued**. The process will be finished when Run Status is **Success**, and Distribution Status is **Posted**. Continue to click the **Refresh** button (every 30 seconds or so) until the screen shows Success and Posted.
49.	Click the **Refresh** button. Refresh
50.	**Run Status** = **Success**, and **Distribution Status** = **Posted**. You can now view the results of the process. Click the **Details** link. Details
51.	Click the **View Log/Trace** link. View Log/Trace
52.	Look for the **PDF** file in the File List. Click the **txersrep_5492712.PDF** link. txersrep_5492712.PDF

Step	Action
53.	The PDF Report opens in a new tab (or a new window, depending on your browser settings).



Step	Action
54.	You can save this PDF report, you can print it, and you can close it when you are finished. Click the **Close Tab (Ctrl+W)** button.



Step	Action
55.	Click the **Return** button. 
56.	Click the **OK** button. 
57.	Other reports are generated in a similar fashion. Click the **Home** link. 
58.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Section 4. FMLA

Section 4. FMLA

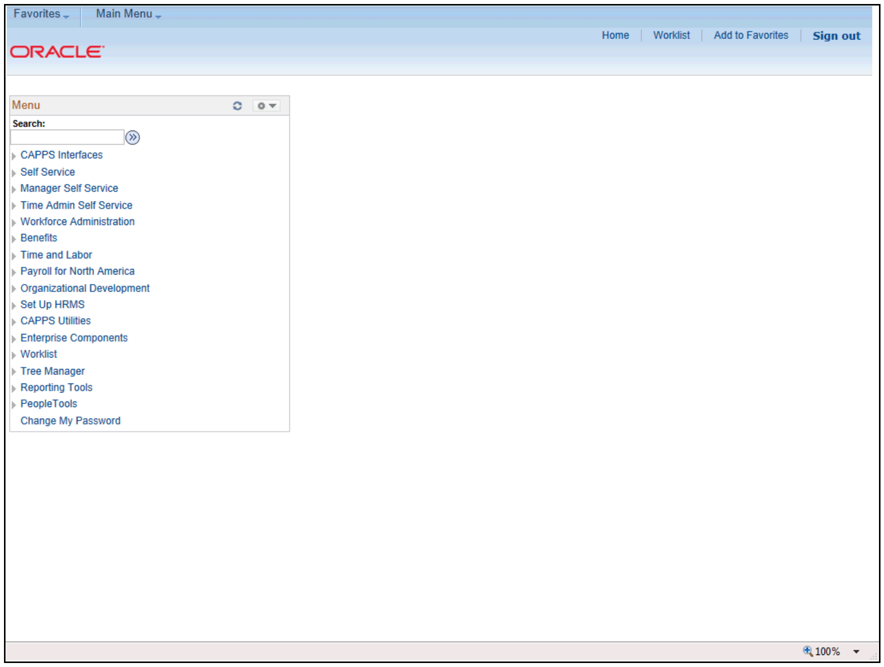
FMLA Query for Eligibility

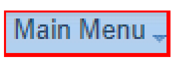
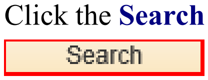
Section 4. Lesson 1. FMLA Query for Eligibility

This lesson shows how to check for eligibile FMLA hours.

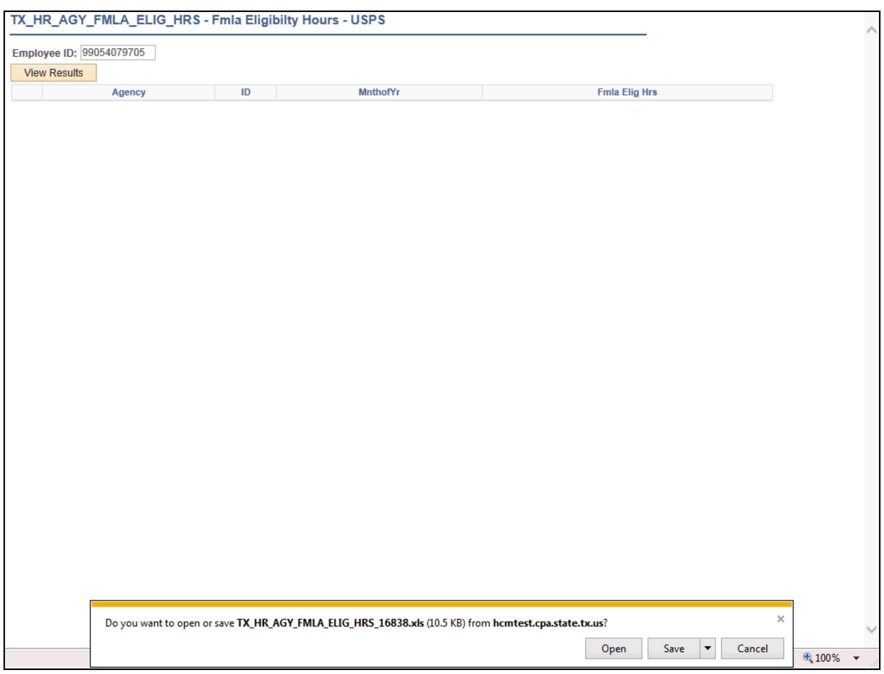
Procedure

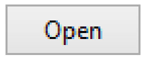
This lesson shows you how to run the FMLA Query for Eligibility.

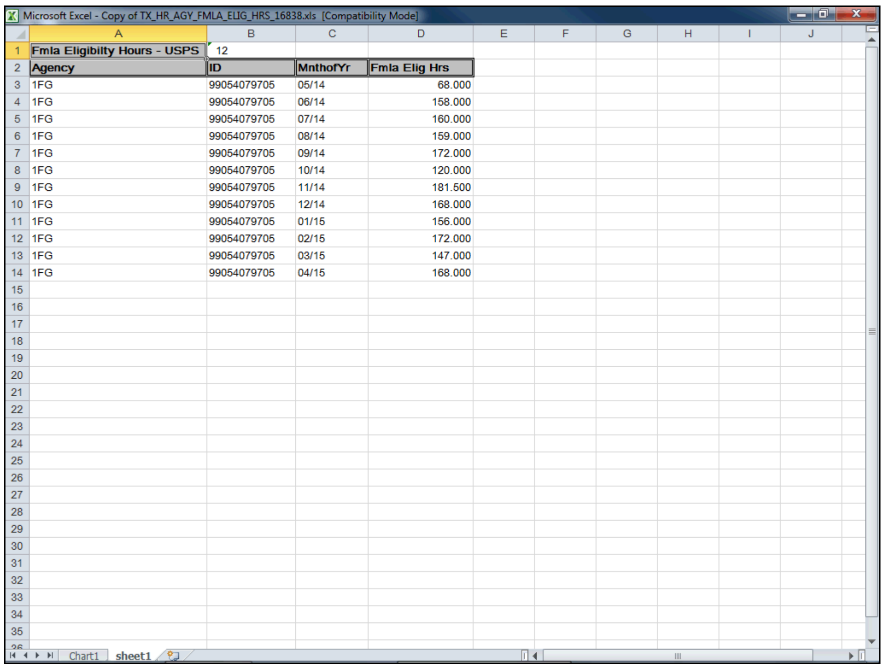


Step	Action
1.	Click the **Main Menu** button. 
2.	Click the **Reporting Tools** menu. 
3.	Click the **Query** menu. 
4.	Click the **Query Viewer** item. 
5.	The query contains the acronym **FMLA**. You learned in the Fundamentals Class that the % sign is a wildcard character. Enter "**%FMLA**" into the **begins with** field. 
6.	Click the **Search** button. 

Step	Action
7.	You can run a query in several ways. The first two are the most common methods: **HTML** - Run this query and put the results in a browser window. **Excel** - Run this query and put the results in a spreadsheet. (**XML** - Not used at this time.) (**Schedule** - Not used at this time.)
8.	Click the **Excel** link. Excel
9.	Based on your browser settings, a new tab or a new window opens, and you must enter the parameter(s) for the query. In this lesson, we will look up the FMLA Eligible Hours for **Empl ID = 99054079705**. Enter "**99054079705**" into the **Employee ID** field. Employee ID:
10.	Click the **View Results** button. View Results

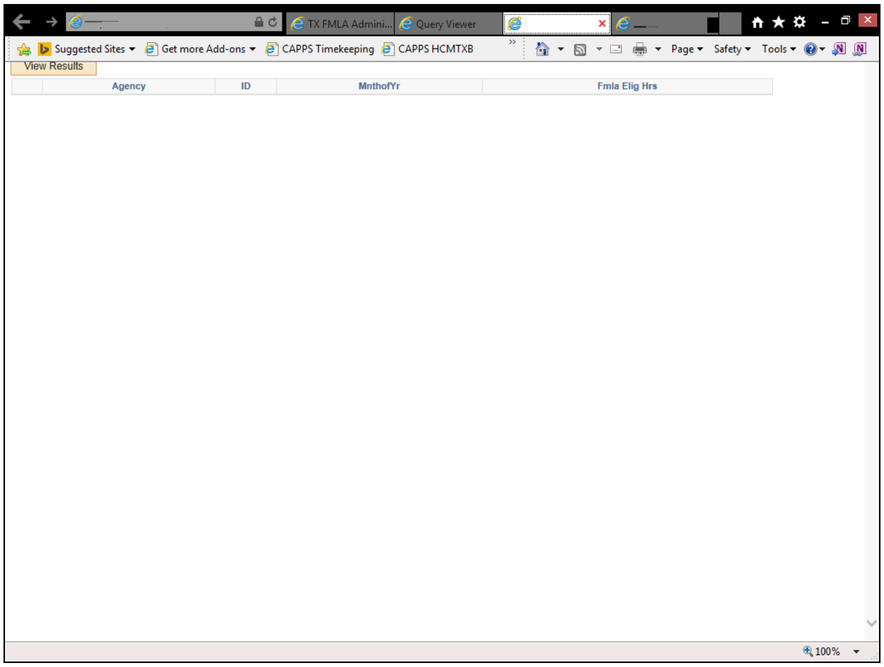


Step	Action
11.	We are running this query to an Excel spreadsheet. Click the **Open** button. 
12.	The system has retrieved the **FMLA-Eligible Hours**, and you can now use this data to determine the employee's eligibility for FMLA.

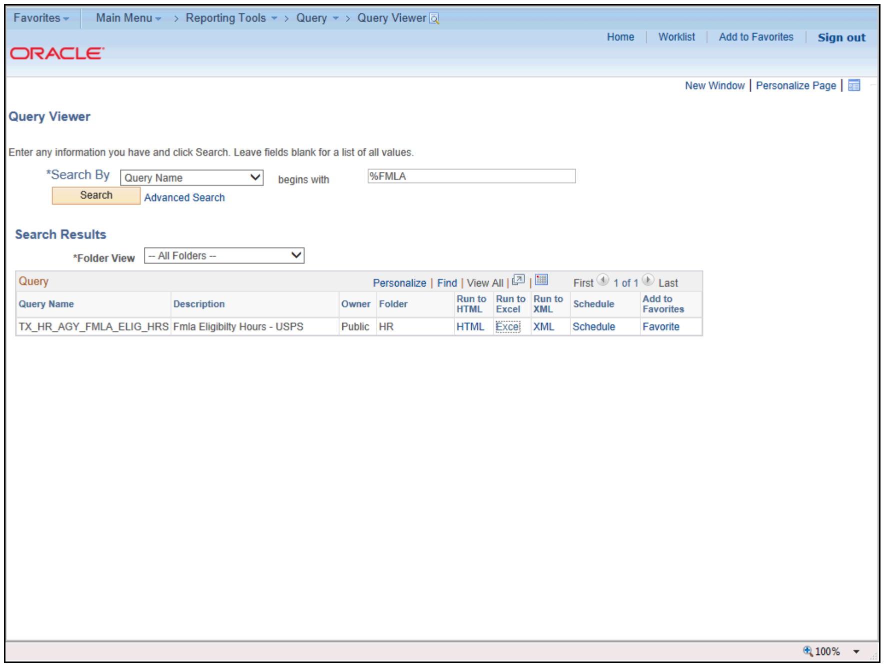


Fmla Eligibilty Hours - USPS	12		
Agency	ID	MnthofYr	Fmla Elig Hrs
1FG	99054079705	05/14	68.000
1FG	99054079705	06/14	158.000
1FG	99054079705	07/14	160.000
1FG	99054079705	08/14	159.000
1FG	99054079705	09/14	172.000
1FG	99054079705	10/14	120.000
1FG	99054079705	11/14	181.500
1FG	99054079705	12/14	168.000
1FG	99054079705	01/15	156.000
1FG	99054079705	02/15	172.000
1FG	99054079705	03/15	147.000
1FG	99054079705	04/15	168.000

Step	Action
13.	Click the **Minimize** button. 



Step	Action
14.	You can close the tab (or window) from which you ran the query. Click the **Close Tab (Ctrl+W)** button.



Step	Action
15.	Click the **Home** link. 
16.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

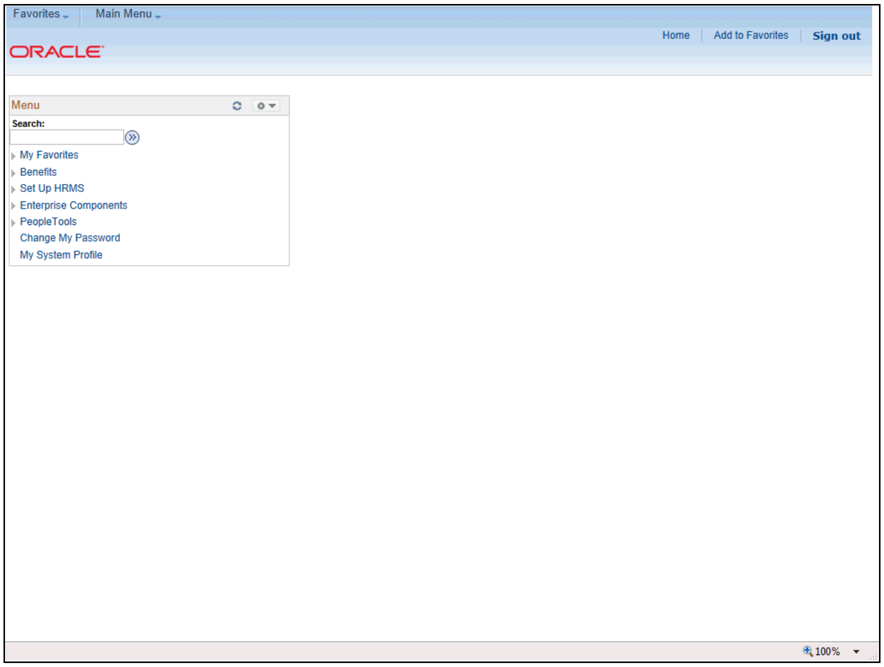
FMLA Activity

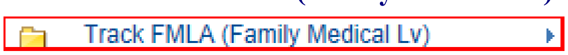
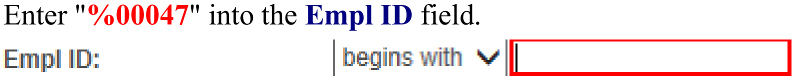
Section 4. Lesson 2. FMLA Activity

This lesson shows how to create an FMLA event, check for eligibility, and approve the event.

Procedure

In this lesson, you will create an FMLA event, check for employee eligibility, and approve the event.



Step	Action
1.	Navigate to the **TX FMLA Administration** page. Click the **Main Menu** link. 
2.	Click the **Benefits** menu. 
3.	Click the **Track FMLA (Family Medical Lv)** menu. 
4.	Click the **TX FMLA Administration** menu item. 
5.	The system provides multiple ways to search for an employee. You can search, for example, by **Empl ID** (Employee ID), **Name** or **Last Name**, or any other search criteria listed on this page.
6.	You will create an FMLA event for Employee ID **00000000047**. Enter "**%00047**" into the **Empl ID** field. 

Step	Action
7.	Click the **Search** button. Search
8.	Click the **Test Employee ZZ** link. Test Employee ZZ
9.	This page is used for both types of Leave: * FMLA Event * Parental Leave Event This lesson shows you how to create an FMLA Event, but you will see the specific entry needed to create a Parental Leave Event.
10.	The ***Request Date** will default to the system date (current date). You can change this value if necessary.
11.	The **Begin Date** is the date on which the FMLA event begins. It can be a future date, today's date, or in this example, a date in the past. The FMLA event began on March 9, 2015. Enter "**03092015**" into the **Begin Date** field. *Begin Date
12.	The **Return Date** is an **optional** field. Enter the expected date of return to work for this employee. In this example, the employee will request 9 weeks of leave, and expects to come back on May 11, 2015. **Note**: this is an optional field. Enter "**05112015**" into the **Return Date** field. Return Date
13.	The system automatically provides an **Expiration Date**, in this case 08/31/2015. This is because in this example, FMLA is tracked for this agency on a fiscal year basis.
14.	The next two fields are optional. If you enter a number in the **Time Requested** field, you can select Days, Hours, or Weeks in the **Time Requested (Units)** field.
15.	Click the **Leave Reason** list. *Leave Reason
16.	Select the appropriate ***Leave Reason** from this list.

Step	Action
17.	Click the **Care of Child** list item. Care of Child
18.	**Leave Type** is an optional field. You can select from **Continuous**, **Intermittent**, **Irregular Intermitten**t, or make no entry at all. The system defaults the value '**Continuous**' when you first open this page.
19.	Click the **Save** button. Save
20.	When you **Save** this page, the system assigns an **FMLA Request ID** number to the event. In this example, **FMLA Request ID** = **001**. This number will be used on the employee's time sheet(s) to reflect time taken for the FMLA event, once this event has been approved.
21.	You must run the **Eligibility** checking process before you can Approve this event. Click the **CAPPS Eligibility** tab. CAPPS Eligibility
22.	On the **CAPPS Eligibility** page, you would enter the **Non CAPPS FMLA Earned Hours** that you calculated based on the query you learned in Lesson 1.
23.	If an employee does NOT qualify for FMLA Leave, but is eligible to take **Parental Leave**, you would change the value in the ***FMLA Plan ID** field.
24.	You would click the look up icon (the magnifying glass) to the right of this field to see the possible choices for **FMLA Plan ID**. This field should be changed when an employee is <u>NOT</u> eligible for FMLA, but can take Parental Leave.
25.	In this example, the employee has enough hours in the CAPPS system to be eligible for FMLA, so there is no entry in the **Non CAPPS FMLA Earned Hours** field. Click the **Eligibility and Entitlement** button. Eligibility and Entitlement
26.	This employee is entitled to receive FMLA time off. Please note that the employee is entitled to 12.0 weeks of leave, but there are only 360.0 hours, because the employee works 30.0 Standard Hours per week.

Step	Action
27.	Now you are able to **Approve** the FMLA activity. Click the **Request** tab. Request
28.	Click the **Approval Status** list. Approval Status Open
29.	Click the **Approved** list item. Approved
30.	Click the **Save** button. Save
31.	Note that the **Approval Status** is now grayed out. This event can now be used on the employee's time sheet(s) to reflect leave time taken under FMLA.
32.	The last tab, **FMLA Activity**, keeps track of how many hours or weeks this employee has remaining on this FMLA event.
33.	Three (3) weeks, or 90 hours, of time has been processed for this employee (the timesheets and processing are not shown in this lesson). Those totals are reflected on this page.
34.	On the previous screen, you saw that Time & Labor hours are reported in **Total TL Hours**. If the employee has LOA hours, the **LOA Activity** section is used for reporting those hours. Enter the time for the days out on LOA that correlate to the Job Data LOA action/reason effective date. When entries are made here, they will be summed into the **Total Job LOA Hours** field.
35.	**Note:** Entering **LOA Activity** hours is a manual step. If any of this time overlaps with T&L time, then T&L time will be deleted. In this way, the system will track the number of days used on FMLA, so that the employee doesn’t take more than the law allows.
36.	The Available FMLA Balance link provides additional details.
37.	The **FLMA Open Events** screen only displays OPEN EVENTS. It displays the **FMLA Request ID and** the **Date Range.**
38.	The **Available Balance** section displays the balance for FMLA and **Military Caregiver (MCL).**

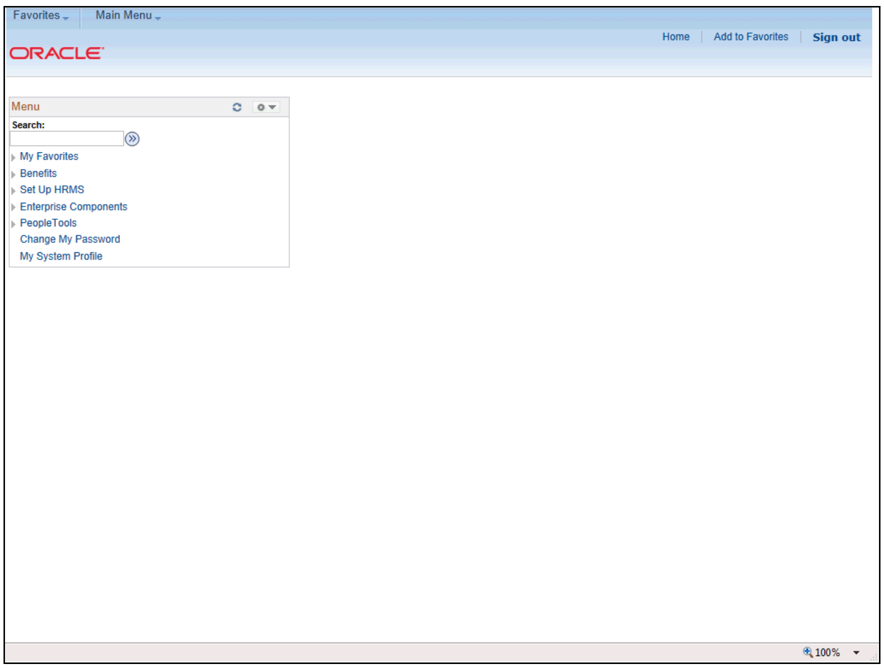
Step	Action
39.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

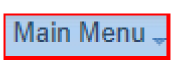
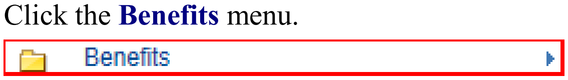
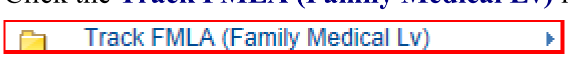
FMLA-related Reports in CAPPS Interfaces

Section 4. Lesson 3. FMLA-related Reports in CAPPS Interfaces

Procedure

This lesson shows you how to generate and view an FMLA-related report.



Step	Action
1.	We will generate the **TX FMLA/PRNTL History Report**. Click the **Main Menu** button. 
2.	Click the **Benefits** menu. 
3.	Click the **Track FMLA (Family Medical Lv)** menu. 

Step	Action
4.	The **TX FMLA/PRNTL History Report** shows FMLA event(s)/history for either an agency, or for a specific employee. **The FMLA Rolling Year Projection Report** is available for specific agencies within this report option. The **TX FMLA ER Insurance Rpt** shows employees (1) who are on a Leave of Absence and (2) who may be eligible for state contributions towards their benefits premiums.
5.	Click the **TX FMLA/PRNTL History Report** menu. TX FMLA/PRNTL History Report
6.	In this example, you have already created a **Run Control ID** for this particular process. Click the **Search** button. Search
7.	Click the **FMLA_PRNTL_HISTORY_REPORT** link. FMLA_PRNTL_HISTORY_REPORT
8.	Several parameters are required on this page. ***Start Date** and ***End Date** are both required.
9.	**Flag** tells the system to pull the report for either **FMLA** data, or for **Parental** (Leave) data.
10.	You can run the process for the entire **Company.**
11.	... or for a specific **employee** in your Company.
12.	Click the **Run** button. Run
13.	Click the **OK** button. OK
14.	Take note of the **Process Instance**, in this example **5492695**.
15.	Click the **Process Monitor** link. Process Monitor
16.	The process is finished when **Run Status = Success**, and **Distribution Status = Posted**. You may need to click on the **Refresh** button (every 30 seconds or so) until the process is finished.
17.	Click the **Refresh** button. Refresh

Step	Action
18.	The process has finished. Click the **Details** link. Details
19.	Click the **View Log/Trace** link. View Log/Trace
20.	Look for the PDF file. It is the output of your report. Click the **txfmlrpt_5492695.PDF** link. txfmlrpt_5492695.PDF
21.	The PDF report opens in a new browser tab (or new window, depending on your browser settings). You can see the 90.00 hours of FMLA Leave Activity.

Centralized Accounting and Payroll/Personnel System
FMLA Leave Activity

Report ID: TXFMLRPT

Run: 04/01/2015 14:26:04
Operator: TX_BN_UPD_FAMILY_MEDICAL_LI
Page: 1 of 1
Process Date: 01/01/2015-04/01/2015

Employee ID: 00000000047
EMPL_RCD: 0
Company: T32

TL FMLA Leave Activity

TRC	Plan ID	Request ID	Date	Hours Attributed to FMLA
SICKT	001	FFY	09-MAR-2015	6.00
SICKT	001	FFY	10-MAR-2015	6.00
SICKT	001	FFY	11-MAR-2015	6.00
SICKT	001	FFY	12-MAR-2015	6.00
SICKT	001	FFY	13-MAR-2015	6.00
SICKT	001	FFY	16-MAR-2015	6.00
SICKT	001	FFY	17-MAR-2015	6.00
SICKT	001	FFY	18-MAR-2015	6.00
SICKT	001	FFY	19-MAR-2015	6.00
SICKT	001	FFY	20-MAR-2015	6.00
SICKT	001	FFY	23-MAR-2015	6.00
SICKT	001	FFY	24-MAR-2015	6.00
SICKT	001	FFY	25-MAR-2015	6.00
SICKT	001	FFY	26-MAR-2015	6.00
SICKT	001	FFY	27-MAR-2015	6.00
			Total TL Hours:	90.00

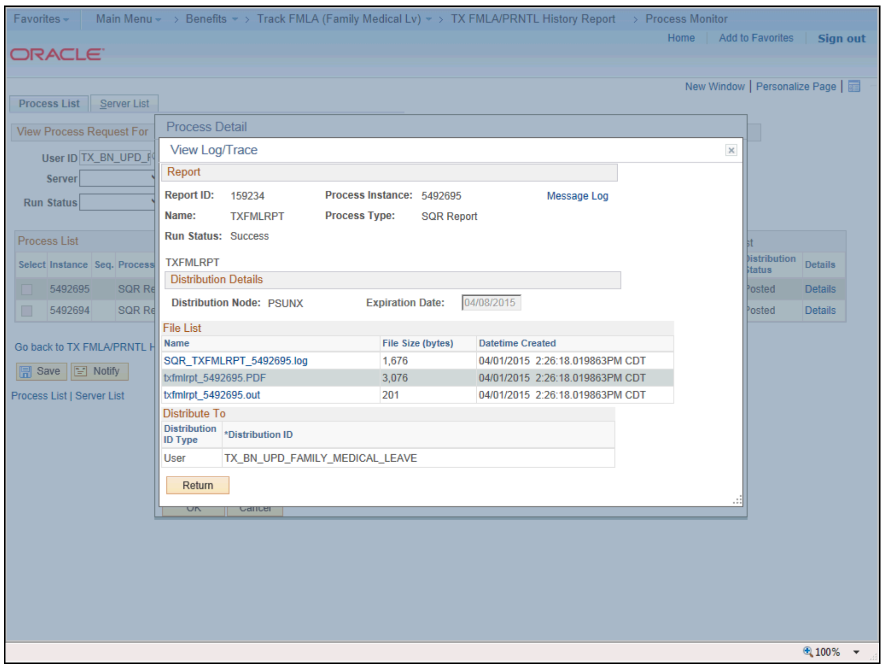
HR FMLA Leave Activity

Plan ID	Request ID	Week Begin Date	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Week Total Hours

---------- No HR Data for this Employee ----------

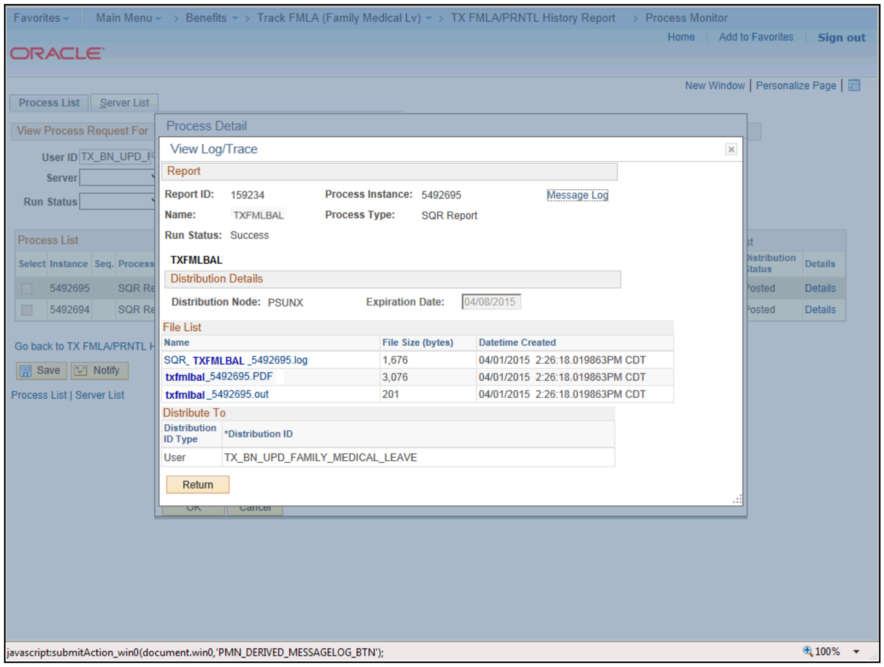
---------- End of Report ----------

Step	Action
22.	When you are done with the report, close this tab. Click the **Close Tab (Ctrl+W)** button.

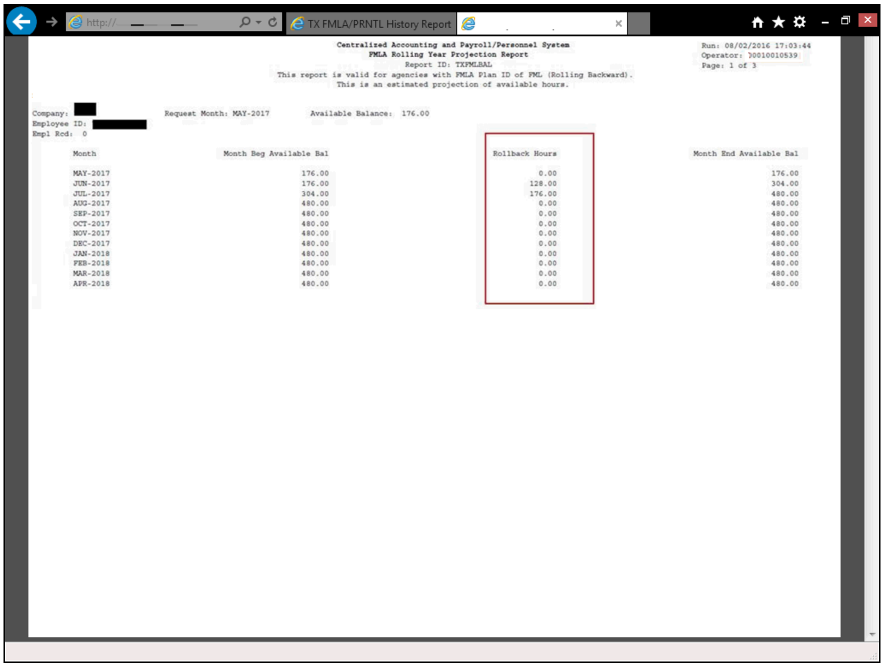


Step	Action
23.	Click the **Return** button. Return
24.	Click the **OK** button. OK
25.	Click the **Go back to TX FMLA/PRNTL History Report** link. Go back to TX FMLA/PRNTL History Repor
26.	**The FMLA Rolling Year Projection Report** Only agencies that have the FMLA Plan ID of FML need to run the **FMLA Rolling Year Projection Report**. This training exercise only ***explains*** the steps to run the report. It will not require you to enter any information.

Step	Action
27.	You will enter the **Company Number** in the Process by Company field.
28.	In the "**As of Date**" field select the date you wish to run. The report will run for 12 months from that date going forward – and display a monthly balance for each employee that has FMLA benefits that will roll into the future months.
29.	After the Company and "As of Date" are entered, you will select the **Run** button.
30.	Select the checkbox next to the description - FMLA Rolling Yr Projection Rpt.
31.	Select the OK button.
32.	Take note of the **Process Instance**, in this example **5492695**. When using the live system, each time a report is run, this number will change.
33.	You will select the **Process Monitor link**.
34.	Make sure that you look for the correct Process Name. The Process Name for this report is **TXFMLBAL**.
35.	The process is finished when **Run Status = Success**, and **Distribution Status = Posted**. You may need to click on the **Refresh** button (every 30 seconds or so) until the process is finished.
36.	Select the **Refresh** button.
37.	The process has finished. Click the **Details** link. Details
38.	Click the **View Log/Trace** link. View Log/Trace



Step	Action
39.	Look for the PDF file. It is the output of your report. Click the **txfmlbal_5492695.PDF** link. txfmlbal_5492695.PDF
40.	The PDF report opens in a new browser tab (or new window, depending on your browser settings). The report prints a page for each person showing the monthly rollback hours (hours the employee used for FMLA during the prior 12 month period from the report date parameter) that are projected to be available to the employee.
41.	This is just a projection report to help agencies plan for potential FMLA utilization. The employee would still need to provide documentation and have a valid FMLA event to use the rollback hours.
42.	Rollback hours projection is based on the STD HRS/FTE in effect when the FMLA period was created; the report is not adjusted by any FTE change after an FMLA event began.


TX FMLA/PRNTL History Report

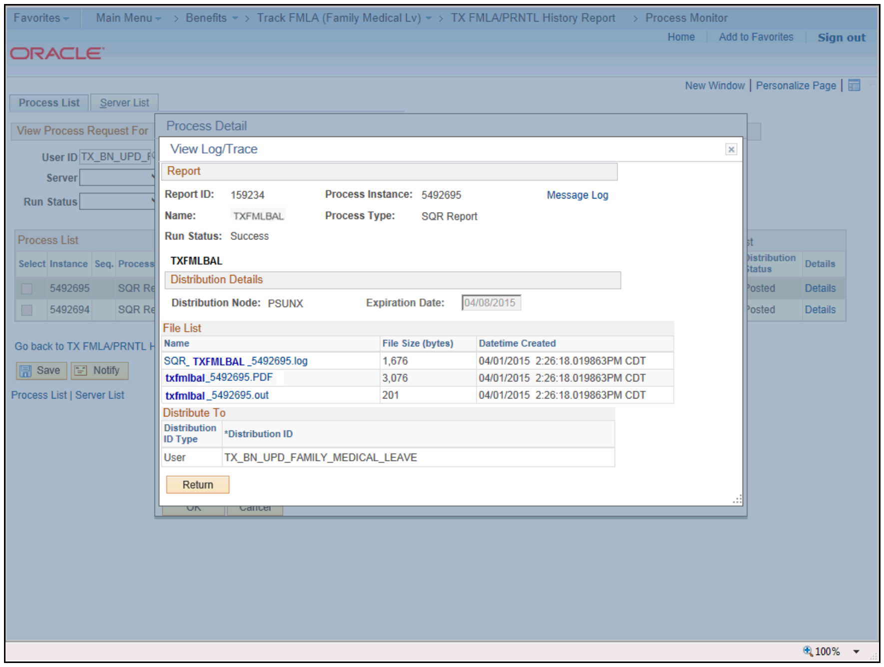
Centralized Accounting and Payroll/Personnel System
FMLA Rolling Year Projection Report
Report ID: TXFMLBAL
This report is valid for agencies with FMLA Plan ID of FML (Rolling Backward).
This is an estimated projection of available hours.

Run: 08/02/2016 17:03:44
Operator: 00010010539
Page: 1 of 3

Company: [redacted] Request Month: MAY-2017 Available Balance: 176.00
Employee ID: [redacted]
Empl Rcd: 0

Month	Month Beg Available Bal	Rollback Hours	Month End Available Bal
MAY-2017	176.00	0.00	176.00
JUN-2017	176.00	128.00	304.00
JUL-2017	304.00	176.00	480.00
AUG-2017	480.00	0.00	480.00
SEP-2017	480.00	0.00	480.00
OCT-2017	480.00	0.00	480.00
NOV-2017	480.00	0.00	480.00
DEC-2017	480.00	0.00	480.00
JAN-2018	480.00	0.00	480.00
FEB-2018	480.00	0.00	480.00
MAR-2018	480.00	0.00	480.00
APR-2018	480.00	0.00	480.00

Step	Action
43.	When you are done with the report, close this tab. Click the **Close Tab (Ctrl+W)** button. ✖



Step	Action
44.	Click the **Return** button. Return
45.	Click the **OK** button. OK
46.	Click the **Go back to TX FMLA/PRNTL History Report** link. Go back to TX FMLA/PRNTL History Report
47.	Congratulations! You have successfully completed this course. **End of Procedure.**

Section 5. Summary and Conclusion

Section 5. Summary and Conclusion

There are no exercises in Section 5, but there is a Knowledge Check.

Glossary

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

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.

XML
XML stands for Extensible Markup Language. It is a text-based formatting language used to share data on internet and intranet web sites.