Time and Labor Super User Course

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

Course: Time and Labor - 150

Hello,

Welcome back to the CAPPS HR/Payroll training.
Before taking this class, you should have already completed the following courses:
CAPPS (99) Fundamentals
CAPPS (100) Employee Self Service
CAPPS (110 or 111) Manager Self Service

Introductions

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

Tell us:
• Your name
• Your business unit 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.

Housekeeping Rules

• Training Materials
• Restrooms
• Emergency Exits
• Please Silence Cell Phones
• Ask Questions
Course Preparations

Pointers and tips to remember while taking this course:

- This course will take approximately 1 day. 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.
- 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 Outline

CAPPS Time and Labor training is organized in seven sections as listed below. Throughout each section, you will learn how to use CAPPS Time and Labor functionality.

- Section 1 - Time & Labor Overview
- Section 2 - Managing and Approving Time
- Section 3 - Administering the Sick Leave Pool
- Section 4 - Time and Labor Troubleshooting
- Section 5 - Time and Labor Setup
- Section 6 - Reports and Queries
- Section 7 - Review

Course Objectives

After completing this course, you will be able to:

- Enter, manage and approve employee time
- Administer the Sick Leave Pool
- Troubleshoot Time and Labor issues
- Maintain Time and Labor Setup
- Run Reports and Queries
Section 1

Time and Labor Overview

Section 1 - Objectives

After completing this section, you will be able to:

- Understand CAPPS Time and Labor
- Understand how CAPPS Time and Labor integrates with other CAPPS HR/Payroll modules
- Identify the different roles and responsibilities involved in Time and Labor
- Understand Key Terms and Definitions

Section 1 - Outline

- CAPPS Time and Labor Overview
- Roles and Responsibilities
- Key Terms and Definitions

Section 1, Lesson 1

CAPPS Overview

- Time and Labor Overview
- Review CAPPS HR/Payroll module integration

Section 1, Overview

Time and Labor is an integrated solution in CAPPS that involves all the processes related to time worked or leave time taken for employees. It supports the time reporting needs of a wide range of business functions such as Payroll, CAPPS Financials, and Labor Allocation cost.

Information entered in Time and Labor is processed through Payroll.

Module Integration

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. Additional core modules include Position Management, Time and Labor, Payroll and Base Benefits. There are also non-core modules such as Performance Management, Learn, and Recruit.

The focus of this training is Time & Labor. CAPPS HR/Payroll system is an integrated system where the HR, Time and Labor and Payroll modules are intricately connected. This means that not only do the modules work together, but they also rely on each other. Positions need to be set up before HR can hire an employee. HR must hire an employee so that they can be enrolled into Time and Labor. Time and Labor must process time entry to send hours to payroll. Funding must be set up in Commitment Accounting for payroll to distribute the payroll.

Section 1, Lesson 2

Roles and Responsibilities

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

**Manager** - This role is responsible for monitoring, reviewing, and approving time worked or leave time taken entered on the employee Timesheet. Managers can also enter time on behalf of an employee.

**Time Administrator** - This role performs the duties of the manager on behalf of the manager. Note: This role is not used by all agencies.

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

**Sick Leave Pool Administrator** - This role is responsible for the Sick Leave Pool and may or may not be a Super User.

Section 1, Lesson 3

Key Terms and Definitions

**Timesheet** - The Timesheet is used to track hours worked and leave time taken for agency employees.

**Time Reporting Codes (TRC)** - TRCs are used to identify the type of hours being entered on the timesheet. For example: When sick leave taken is entered on timesheet the hours entered are assigned the TRC for sick leave taken “SICKT”. All time on the
timesheet is associated to a TRC. Each different type of time has its own unique TRC. For example: Regular Time Worked is “REGHR” and Annual Leave is “ANLVT”.

**Time Exceptions** - Time Exceptions are warnings and errors to indicate a problem with a time reporter’s time.

**Reported Time** - Reported time is the hours that an employee enters on their Timesheet.

**Payable Time** - Payable time is the reported time that has been processed through Time Admin that an employee has entered on their Timesheet and has been approved by their manager. It also includes regular scheduled hours that have been processed through Time Admin that do not need to be entered on the Timesheet.

**Time and Labor** - Time and Labor is an integrated solution in CAPPS that involves all the processes related to time worked or leave time taken for employees. It supports the time reporting needs of a wide range of business functions such as payroll, CAPPS financials, and labor allocation cost. Information entered in Time and Labor is processed through payroll.

**Labor Account Code (LAC)** - The LAC is used to associate worked hours against a specific project. This information does not integrate with Financials/Commitment Accounting. This field can be used for reporting purposes.

**Override Reason Code (ORC)** - ORC’s are used for tracking purposes to identify periods of time that are worked for a specific reason such as recording time worked during a disaster. The agency must submit a ticket to CPA to add ORCs.

**Positive Time Reporter** - Positive Time Reporters are hourly employees. They do not have schedules in CAPPS so an assigned schedule does not appear on their Timesheet. Positive Time Reporters need to enter all hours physically worked or leave taken on their Timesheet in order to get paid.

**Exception Time Reporter** - Exception Time Reporters are Exception Hourly (salaried) employees. Their Timesheet reflects an assigned schedule with the applicable daily hours. Exception Time Reporters enter time on the timesheet only when it deviates from their assigned scheduled hours or when they have to report a LAC for specific purposes. This includes hours worked beyond the assigned schedule and any leave time taken during their assigned schedule.

**FMLA ID** - This field is used to track FMLA hours. The FMLA ID number is manually entered.

**Time Administration** - The Time Administration process is an overnight process that validates approved time. It creates Payable Time which is used for payroll processing, and creates exceptions when time fails the Time and Leave rules validation process.

**Workgroups** - A workgroup is a group of employees who share the same time reporting and compensation requirements. Each time reporter who reports time through Time and Labor must belong to a workgroup. The workgroups within CAPPS include Exempt,
Non-Exempt and Contractors.

**Work Schedule** - Pre-defined work days/ hours (i.e. Monday - Friday, 8 hours per day). Work schedule represents each employee’s standard work week.

**Section 2**

**Managing and Approving Time**

**Section 2 - Objectives**

After completing this section, you will be able to:

- Understand the CAPPS Timesheet
- Learn how to use Time Reporting Codes
- Create and adjust Timesheet entries
- Add Overtime and Lump Sum payouts
- View and Close Payable Time

**Section 2 - Lesson Outline**

- Timesheet Overview and Time Reporting Codes
- Timesheet Entries
- Adjusting Timesheet Entries
- Overtime and Lump Sum Payouts
- Viewing and Closing Payable Time

**Section 2, Lesson 1**

Timesheet Overview and Time Reporting Codes

- Understand the fields on the Super User Timesheet
- Learn the Time Reporting Codes (TRCs)

**Section 2, Lesson 1 Exercise**

Exercise:

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

Timesheet Overview
Scenario 1 - Super User Timesheet Overview

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

After completing the exercise, close the browser tab and return to the course.
Section 2, Lesson 1

Time Reporting Codes (TRC)

- TRCs are used to identify the type of hours being entered on the Timesheet.
- Super Users have access to TRCs that employees and managers do not.
- Most leave balances are immediately adjusted based on the hours entered.

Section 2, Lesson 2

Timesheet Entries

- Create Timesheet entries for employees
- View leave balances on the Timesheet for an employee
- Override a work schedule

Super User Timesheet Entries

It is the responsibility of employees and managers to enter their own time. On occasion, a Super User may have to enter time for someone that is not able to enter their own time.

This course will provide a brief overview of timesheet entry. It will focus on entering TRCs on a timesheet that employees and managers do not have access to enter.

Section 2, Lesson 2 Exercises

Exercises:

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

Timesheet Entries

Scenario 1 - Entering Time for Employees
Scenario 2 - Viewing Leave Balances

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

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

Military Leave

- Military Leave must be awarded before it can be used.
- Employees can carry forward 360 hours (45 days) of unused Military Leave at the end of the Federal Fiscal Year (October - September).
- Military Leave time is awarded manually by an Agency Super User when the leave time is required.
- Employees authorized for this leave are allowed 15 days per Federal Fiscal Year. Any unused time will be carried forward into the next Federal Fiscal Year.
Leave Without Pay (LWOP)

A full month of LWOP on the Timesheet adjusts the employee’s State Service Effective Date by one month.

Note: When on LWOP for a full month the T&L LWOP Months field in Job Data increments by the number of full months. This affects longevity pay, state-pay for benefits, and state service accrual.

If an employee is on LWOP for their full scheduled hours on the first scheduled work day of the month, then they will not receive Longevity pay for that entire month.

Section 2, Lesson 3

Adjusting Timesheet Entries

- Entering time awarded to employees
- Understanding time transferred out TRCs
- Understand TRCs for lost time

Time Awards

- Occasionally employees are awarded time. Super Users are responsible for adding these awards to an employee’s timesheet.
- Examples of awarded time are: Admin Leave, Extended Sick Leave, and Fitness Leave

The process for awarding the leave time is to access the Super User Timesheet for the employee, add a row and add the appropriate TRC, and the hours on the day that they are awarded.

Time Transfers

- When an employee transfers between CAPPS agencies, their leave balances will transfer with them automatically.
- When an employee transfers to or from a non-CAPPS agency, the Super User will have to manually transfer the leave balances. Each leave type will have a TRC to transfer in and a TRC to transfer out.
- The process for transferring the leave time is to access the Super User Timesheet for the employee, add a new row, add the appropriate TRC, and add the hours on the employee’s first or last scheduled workday.

Leave Lost TRCs

Use the Lost TRCs (TRCs ending with L) for employees who have terminated and have leave balances that are not eligible to be paid out to the employee at the time of termination. Examples of Leave Lost are Comp Time and Administrative leave.
A system process will run after 180 days of inactivity and zero out any remaining balances and will create the system-generated Lost TRCs (ending in an X).

For example, if Comp Time remained on a terminated employee’s Timesheet for 180 days the system process will generate a transaction using the COMPX TRC. However, despite this process occurring automatically, the agencies should develop their own business processes for clearing out an employee’s time after an employee is terminated.

**Section 2, Lesson 4**

**Overtime and Lump Sum Payments**

- Insert the Overtime paid TRC on an employee’s Timesheet
- Work with the managers to pay out leave balances for terminated employees

**Lump Sum Payouts**

CAPPS automatically processes lump sum payments for terminated employees. The automated process first validates that the employee has not been hired at a state agency and if not, 30 days after the termination, the process will place the lump sum on the employee’s timesheet for payment. CAPPS also automatically processes death payments according to statute for both annual and sick leave and places the entry on the timesheet for payment.

When an employee transfers to a non-accruing position either at the same agency or a new agency, the agency must submit a Letter of Authorization form in order to pay a lump sum to that employee. The agency will work with their CAPPS Production Support team to properly process this type of lump sum payment.

**Section 2, Lesson 4 Exercise**

Exercise:

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

**Paying Out Overtime**

Scenario 1 - Paying Out Overtime

View Section 2, Lesson 4 exercise scenario (opens a new web browser).

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

**Section 2, Lesson 5**

**Payable Time**

- View Payable Time Summary and Detail
- Close Payable Time
Payable Time

Time Admin converts Scheduled Hours and Approved Reported Time into Payable Time for Payroll processing.

- Reported Time that is not approved will not be processed through Time Admin and will not be pulled by Payroll.
- Reported time that is not approved will not create Comp Time or Overtime for the workweek.

Timing of Time Admin

- Time Admin runs each night for all agencies, but due to timing of Payroll, a Time and Labor Super User may need to run this process ad hoc before processing Payroll.
- Agency Time & Labor staff must coordinate with Payroll staff to ensure all data will be ready and available.
- Payroll impacting time entries must be approved and processed by Time Admin to be pulled by Payroll.

Section 2, Lesson 5 Exercises

Exercises:

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

Payable Time

Scenario 1 - Viewing Payable Time
Scenario 2 - Closing Payable Time

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

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

Section 3

Administering the Sick Leave Pool

Section 3 - Objectives

After completing this section, you will be able to:

- Award leave to an employee from the Sick Leave Pool
- Donate sick leave to the pool
- Run the Fiscal Year End Sick Leave Pool process
Section 3 - Lesson Outline

- Entering Sick Leave Pool Awards and Donations for Employees
- Fiscal Year End Sick Leave Pool Processing

Section 3, Lesson 1

Entering Sick Leave Pool Awards and Donations

- Award hours to an employee from the Sick Leave Pool
- Donate sick leave from an employee to the Sick Leave Pool

Sick Leave Pool Administrators

- A Sick Leave Pool Administrator may also be a Super User, but not every Super User will be a Sick Leave Pool Administrator.
- Only the people with a Sick Leave Pool Administrator role can adjust Sick Leave Pool for employees or the agency.
- Follow the agency’s guidelines for keeping a track of adjustments. A running total is kept in CAPPS. This training is for adjusting the total balance.

The Sick Leave Pool Administrator will be responsible for:

- Awarding sick leave to an employee
- Entering the transaction for an employee who is donating sick leave to the pool
- Adjusting the Agency’s overall total of the Sick Leave Pool in the CAPPS
- Making sure that the Sick Leave Pool balance is accurate

Section 3, Lesson 1 Exercises

Exercises:

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

Sick Leave Pool Transactions

Scenario 1 - Awarding Sick Leave Pool to an Employee
Scenario 2 - Donating Sick Leave from an Employee to the Pool

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

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

Section 3, Lesson 2

Fiscal Year End Sick Leave Pool Processing

- Running the Fiscal Year End Sick Leave Pool process
Section 3, Lesson 2
Fiscal Year End Sick Leave Pool Process

- Always run the previous year after all activity has been entered for that year.
- Anytime an entry is made to a previous year this process must be re-run after the retro transaction(s) are entered.
- The CAPPS HR/Payroll Support team will provide support through this process.

Section 3, Lesson 2 Exercise

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

Fiscal Year End Sick Leave Pool Process
Scenario 1 – Running the Fiscal Year End Sick Leave Pool Process

View Section 3, Lesson 2 exercise scenario (opens a new web browser).

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

Section 4

Time & Labor Troubleshooting

Section 4 - Objectives

After completing this section, you will be able to:

- Manage exceptions
- Run the Time Administration process
- Update the Earliest Change Date

Section 4 - Lesson Outline

- Managing Exceptions
- Updating & Processing Information

Section 4 - Lesson 1

Managing Exceptions

- Run the Exceptions query
- Use the Manage Exceptions page
- Run an ad-hoc Time Administration process
**Section 4 - Lesson 1**

Managing Exceptions

- Run the Exceptions query
- Use the Manage Exceptions page
- Clear the exception and run the Time Administration process

**Managing Exceptions**

There are timesheet on-line edits that are built into Time and Labor to prevent common errors such as:

- Entering more leave than currently available
- Entering leave hours greater than scheduled hours
- Entering leave within 6-month probationary period

In cases where there are no on-line edits for errors, exceptions are created.

**Common Exceptions**

- Invalid Comp Time/TRC Balance (Employee used newly earned OT hours and later remembered to key leave that caused the Overtime to become Comp Time. An Overtime balance was no longer available to use.)
- Reported Leave is Greater than Scheduled Hours (Employee used 8 hours of leave and then changed their schedule to be 7 hours on that day).
- Employee has paid TRC in Reported Time past termination date (time on the timesheet past termination will not be paid).

**Managing Exceptions**

- Exceptions prevent employee timesheet entry.
- All exception errors must be cleared prior to Payroll.
- Time and Labor Super Users will need to run Time Admin ad hoc.
- Queries are available to assist in resolving exceptions.

**Section 4, Lesson 1 Exercises**

Exercises:

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

Scenario 1 - Running the Exceptions Query
Scenario 2 - Manage Exceptions Page
Scenario 3 - Running an Ad-Hoc Time Admin Process

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

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

Section 4 - Lesson 2

Updating & Processing Information

- Updating the Earliest Change Date

Section 4, Lesson 2 Exercise

Exercise:

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

Updating & Processing Information
Scenario 1 - Updating the Earliest Change Date

View Section 4, Lesson 2 exercise scenario (opens a new web browser).

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

Section 5

Time & Labor Setup

Section 5 - Objectives

After completing this section, you will be able to:

- View an employee’s Time Reporter Data
- Understand how to update an employee’s work schedule
- Understand the employee shift differential pay
- Run the fiscal year end annual leave conversion process

Section 5 - Lesson Outline

- Maintaining Time Reporter Data and Comp Plans
- Modifying an Employee’s Work Schedule
- Updating an Employee’s Shift Differential Pay
- Running the Fiscal Year End Annual Leave Conversion Process
Section 5, Lesson 1

Maintaining Time Reporter Data

- View an employee’s Time Reporter Data
- Understand the time reporter component data

Maintaining Time Reporter Data and Comp Plans

Time and Labor provides control over tracking an employee’s time worked. Time Reporter Data is time information about the employee, information like exempt, non-exempt, and the agency that pays for their time.

The Time Reporter Data page is set up at the time of hire (or conversion into the CAPPS system). This is a view only page for Agency users, but it can provide information when trying to understand issues with an employee’s time.

The Comp Plan Enrollment page is also set up at the time of hire (or conversion into the CAPPS system) and allows the agencies to adjust what comp plans the employee is enrolled into.

Section 5, Lesson 1 Exercises

Exercises:

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

Time Reporter Data and Comp Plan Pages

Scenario 1 - Viewing Time Reporter Data

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

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

Section 5, Lesson 2

Modifying an Employee’s Work Schedule

- Temporarily change an employee schedule (Flex or Override)
- Modify a regular work schedule (Permanent)

Section 5, Lesson 2

Work Schedules

- With manager approval, an employee can flex their schedule using the FLEXS Time Reporting Code on the Timesheet.
- The agency must have a business process in place whether to allow or not allow FLEXS to be used.
- Override Schedule can only be performed by a Manager, Time Administrator or...
Super User. This is a temporary schedule change.

- A Manager, Time Administrator or Super User can permanently change an Employee’s schedule.
- The Super User changes this on the Assign Work Schedule page. A Super User can also edit or insert historical rows to the employee’s schedule.

Section 5, Lesson 2 Exercises

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

Work Schedule Changes
Scenario 1 - Flexing or Overriding a Work Schedule
Scenario 2 - Modifying a Work Schedule

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

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

Section 5, Lesson 3

Updating an Employee’s Shift Differential Pay

- CAPPS has the functionality to apply shift differential pay to applicable employees.

Shift Differential Pay

- Some employees are eligible for shift differential pay.
- To receive shift differential pay, the employee must be set up in Job Data working in an eligible shift.

Section 5, Lesson 4

Running the Fiscal Year End Annual Leave Conversion Process

- Understand how to run the Fiscal Year End Annual Leave Conversion Process

Section 5, Lesson 4

Fiscal Year End Process

- The Fiscal Year End Annual Leave Conversion process is run only once each year after all other fiscal year end processes are run.
- This process converts Annual Leave that is over the allowed carryover limit into Sick Leave.
Section 5, Lesson 4 Exercise

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

Fiscal Year End Leave Conversion Process

Scenario 1 - Running the FYE Annual Leave Conversion Process

View Section 5, Lesson 4 exercise scenario (opens a new web browser).

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

Section 6

Reports & Queries

Section 6 - Objectives

After completing this section, you will be able to:

- View the most common reports and queries
- Run queries in Excel

Section 6, Lesson 1

Reports and Queries

There are many reports and queries that may be helpful in your role as a Super User.

- Reports are predefined and can be printed in a PDF format or viewed on your monitor.
- Queries can be displayed in HTML and viewed on the monitor or they can be run to Excel. Once in Excel you can modify the information.

Reports

The available reports for Time and Labor Super Users are listed using this menu path:

Time and Labor > Texas Reports

Queries

The available Queries for Time and Labor Super Users are listed using this menu path:

Reporting Tools > Query Viewer > TX_TL.

Queries are also listed in folders by module.
Section 6, Lesson 1 Exercises

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

Reports and Queries
Scenario 1 - Running the Employee Monthly Time and Leave Report
Scenario 2 - Running the TRCs by Date Report
Scenario 3 - Running the Comp Balances by Employee Query
View Section 6, Lesson 1 exercise scenario (opens a new web browser).

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

Section 7

Review

Activities for Time and Labor Super Users

- Resolve Exceptions daily.
- Monitor time entries for the first few months after go-live, especially around holidays, to ensure employees are entering time correctly.
- Run the SCHAP Not Processed query every week.
- Run the Needs Approval queries on a regular basis.
- Monitor and resolve any TL setup error notifications as they occur. The notifications are received via email.
- Monitor terminations and ensure balances are being transferred out appropriately. Remember, only certain balances are paid out in certain conditions. Annual and Sick Leave balances will automatically transfer upon rehire if an employee is a direct transfer within CAPPS Baseline (not HUB). All other balances should be cleared out manually.
- Run the Optional Holiday Owed Report prior to the last skeleton crew holiday and contact your employees as needed.
- Run the FYE Annual Leave Conversion process after the Fiscal Year End Conversion has completed. This is run only once a year.
Sick Leave Pool Administrator

- Run the Sick Leave Pool FY Balance process after the Fiscal Year End Conversion has completed.
- This process is run for the prior FY and can be re-run as many times as needed throughout the year to account for any entries made to the prior fiscal years.

Questions

What questions do you have?

Closing

Summary & Conclusion

Summary

Congratulations, you have completed this course.

You learned the following regarding CAPPS Time and Labor:

- How to Manage and Approve time
- How to Administer the Sick Leave Pool
- How to Troubleshoot Time and Labor
- How to Maintain Time and Labor Setup
- How to Run Reports and Queries

Conclusion

This completes Course 150 - Time and Labor.

Hope you enjoyed this course, see you next time!