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

Time and Labor

Course Number: 150
Course Name: Agency Time and Labor

Welcome

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 Preparation

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”.

Course Outline

Understand how to use CAPPS Time and Labor to perform the following tasks:

- **Section 1** - Time & Labor Overview
- **Section 2** - Approving and Managing 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

Understand how to use CAPPS Time and Labor in the following areas:

- Approving and Managing Time
- Administering the Sick Leave Pool
- Troubleshooting Time and Labor
- Maintaining Time and Labor Setup
- Running Reports and Queries
Section 1

Time and Labor Overview

Objectives

After completing this section you will be able to:

- Understand the CAPPS overview
- Learn the different roles for Time and Labor
- Learn new terms and their definitions

Outline

Lesson 1) CAPPS Overview – 10 min
Lesson 2) Time and Labor Roles and Definition – 10 min
Lesson 3) New Terms and Definitions – 10 min

Section 1, Lesson 1

CAPPS Overview

- Review the CAPPS system

Section 1 - 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. The additional core modules for this phase include Position Management, Time and Labor, Payroll and an interface for Base Benefits. Modules such as Recruiting Solutions, Learning Management and Performance Management will be added to CAPPS HR/Payroll in the future.

The focus of this training is Time & Labor. CAPPS HR/Payroll system is an integrated system where the Payroll module and the Time & Labor module are intricately connected. Therefore, how an employee fills out their timesheet in the CAPPS HR/Payroll system is directly tied to how they will be compensated through Payroll. Super Users have a unique role in ensuring the information between the two modules is processed correctly.

In this course Super Users will learn the various tasks associated with their role.
Section 1, Lesson 2

Roles & 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

Terms & 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 an 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 – Approving and Managing Time

Objectives

After completing this section you will be able to:

- Understand the CAPPS Timesheet
- Learn the Time Reporting Codes
- Create Timesheet entries
- Adjust Timesheet entries on employee Timesheets
- Add Overtime and Lump Sum payouts
- View Payable Time

Section 2 - Lesson Outline

Lesson 1) Timesheet Overview and Time Reporting Codes
Lesson 2) Timesheet Entries
Lesson 3) Adjusting Timesheet Entries
Lesson 4) Overtime and Lump Sum Payouts
Lesson 5) Viewing Payable Time and SCHAP/SCHEP

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 exercise scenario (opens a new web browser).

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

Time Reporting Codes (TRC)

- TRCs are used to distinguish between the different type of hours on the Timesheet
- Super Users have access to TRCs that employees and managers do not
- TRCs can be looked up in the system
- Most leave balances are immediately adjusted based on the hours entered.

Timesheet Entries

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

Employee Self-Service (ESS) and Manager Self-Service (MSS) are prerequisites for this course.

Those classes trained how to enter time onto the Timesheet. This class will focus on entering TRCs on the 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 exercise scenario (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
- See the TRC handout for a list of the codes to use on the Timesheet when awarding and using Military leave

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 (refer to the list of TRCs)

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 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

When an employee transfers to a new agency into a non-accruing leave position, agencies must submit a Letter of Authorization form in order to pay a lump sum to that employee.

Normally in this situation the hiring agency or the employee will contact the terminating agency to notify them that the employee is owed their lump sum. The terminating agency should be verifying this with the new agency before taking further action. Once this is confirmed the terminating agency will need to submit a Letter of Authorization form to SHRPA the same way that they do today for their USPS issues. SHRPA will work with the agency and notify them when the lump sum can be paid.
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 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
- Review the SCHEP/SCHAP handout
- View Payable Time Detail
- Close Payable Time

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 exercise scenario (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

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
- Maintain the agency’s Sick Leave Pool balance
- Run the Fiscal Year End Sick Leave Pool process

Section 3 - Outline

Lesson 1) Entering Sick Leave Pool Awards and Donations for Employees - 60 min
Lesson 2) Fiscal Year End Sick Leave Pool Processing - 30 min
Lesson 3) Section Review - 30 min

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
- Enter transactions on the agency’s Sick Leave Pool adjustment page

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 making adjustments to 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,
- Making adjustments to the Agency’s overall total of the Sick Leave Pool in the CAPPS system
- 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
Scenario 3 - Entering Adjustment to the Agency’s Sick Leave Pool

View exercise scenario (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

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.

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 - Fiscal Year End Sick Leave Pool Process
After completing the exercise, close the browser tab and return to the course.

**Section 4 – Time & Labor Troubleshooting**

**Objectives**

After completing this section you will be able to:

**Manage Exceptions:**

- Learn to resolve exceptions
- Learn how to run the Time Administration process
- Updating the Earliest Change Date

**Section 4 - Lesson Outline**

Lesson 1) Managing Exceptions - 60 min
Lesson 2) Updating & Processing Information - 30 min

**Managing Exceptions**

- Run the Exceptions query
- Use the Manage Exceptions page
- Run an ad-hoc Time Administration process

**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 exercise scenario (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 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**

**Objectives**

After completing this section you will be able to:

- View an employee’s Time Reporter Data
- Update an employee’s Comp Plans
- Understand how to update an employee’s work schedule as needed
- Learn how to update an employee’s shift differential pay as needed
- Run the fiscal year end annual leave conversion process
Section 5 - Lesson Outline

Lesson 1) Maintaining Time Reporter Data and Comp Plans - 30 min
Lesson 2) Modifying an Employee’s Work Schedule - 30 min
Lesson 3) Updating an Employee’s Shift Differential Pay - 15 min
Lesson 4) Running the Fiscal Year End Annual Leave Conversion Process - 15 min

Section 5, Lesson 1

Maintaining Time Reporter Data and Comp Plans

- View an employee’s Time Reporter Data
- Understand the time reporter component data
- Add or update an employee’s Comp Plan data

Overview

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
Scenario 2 - Maintaining Comp Plan Enrollment

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

Modifying an Employee’s Work Schedule

- Add an additional row of data to change an employee’s work schedule
- Add or modify an employee’s regular work schedule

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 exercise scenario (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

- Learn the fields that require changes to an employee’s shift differential pay

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 as an employee that works in an eligible shift.

Section 5, Lesson 3 Exercise

Exercise:

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

**Updating an Employee’s Shift Differential Pay**

**Scenario 1 - Modifying a Differential Pay Setup**

[View exercise scenario (opens a new web browser).]

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

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

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:

Running the Fiscal Year End Annual Leave Conversion Process

Scenario 1 - Running the FYE Annual Leave Conversion Process

View exercise scenario (opens a new web browser).

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

Section 6 – Reports & Queries

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 have the ability to modify the information.

This section will step you through some of the most common reports and queries for Time & Labor Super Users. Use the information to run the other reports and queries when they are needed.
Reports
The available reports for Time and Labor Super Users are listed under the following menu path:

Time and Labor > Texas Reports

Queries
The available Queries for Time and Labor Super Users are located via the following menu path:
Reporting Tools > Query Viewer > TX_TL. Then click Search for a list of available queries

Queries are also listed in folders by module. Use the Advanced Search feature and enter the folder name (TL).

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 Full Month of LWOP Report
Scenario 3 - Running the TRCs by Date Report
Scenario 4 - Running the Comp Balances by Employee Query

View 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 on a daily basis.
- 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. And Annual and Sick Leave balances will automatically transfer upon rehire if an employee is a direct transfer within CAPPSS 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 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.

Closing – Summary & Conclusion

Summary

Congratulations, you have completed this course. You learned the following regarding CAPPSS Time and Labor:

- How to Approve and Manage 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.