

CAPPS Desk Aid

Correcting Personnel Start Date

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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Correcting Personnel Start Date

Overview

An agency can correct a start date when it discovers that an employee was hired with an incorrect start date and it still has the ability to correct history. In the event the agency does not have the ability to correct history, a Letter of Authorization (LOA) must be submitted to correct all fields.

An LOA is still **required** to correct the start date in the **Time and Labor** module, regardless of the ability to use correct history mode. Follow these instructions to correct remaining fields **prior to** submitting the LOA using the **Time and Labor** module.

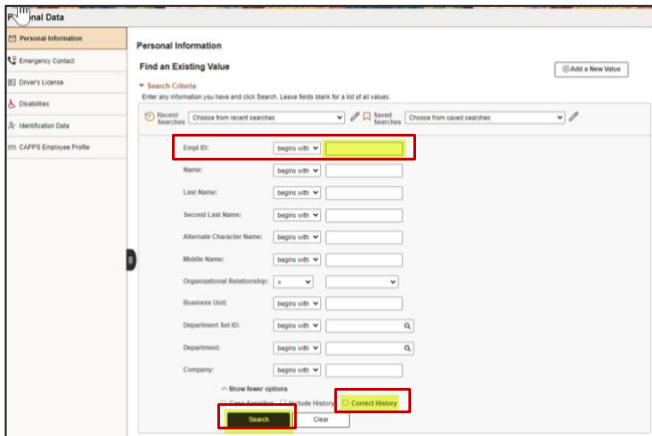
Correcting the Start Date in Personal Data

Navigation

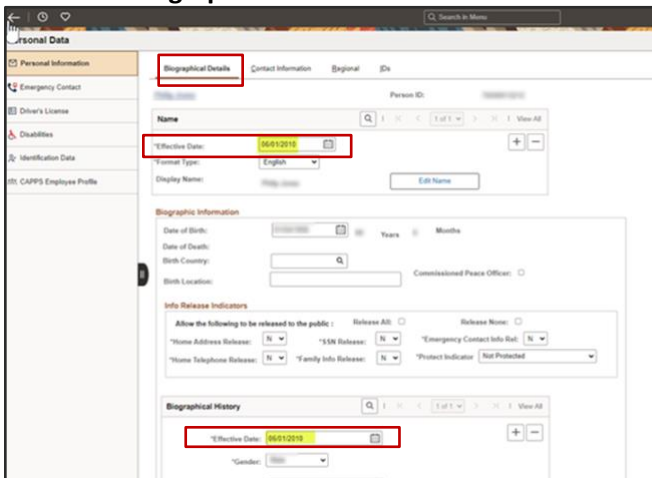
Dashboard: Workforce Administration; **Tile:** Personal Data

To correct the employee’s start date, from the **Personal Data** page.

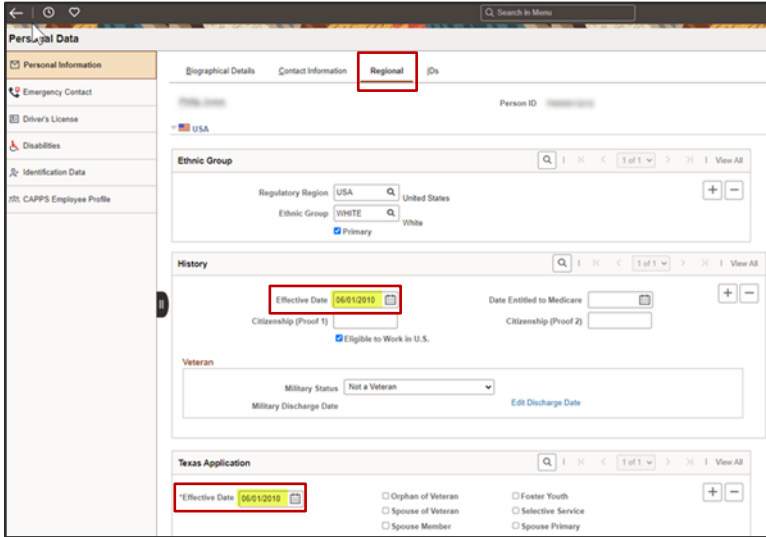
1. Select **Personal Information** in the left-hand menu.
2. Enter the EMPL ID.



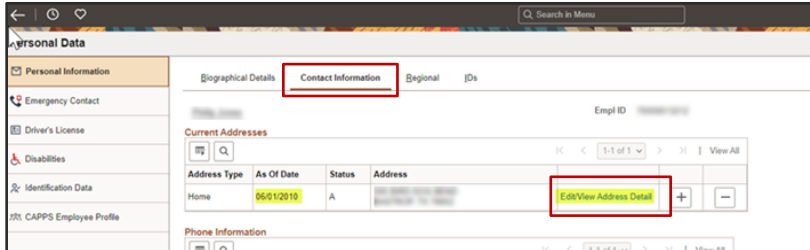
3. Select the **Correct History** checkbox.
4. Select **Search**.
5. Select the **Biographical Details** tab.



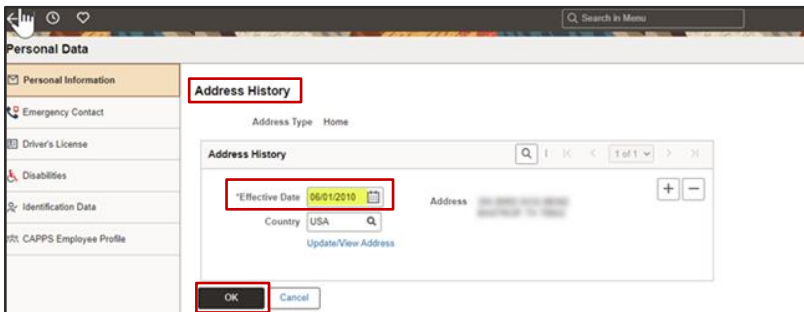
6. Enter the correct EFFECTIVE DATE fields.
7. Select the **Regional** tab.



8. Enter the correct EFFECTIVE DATE fields.
9. Select the **Contact Information** tab.
10. Select **Edit/View Address Detail** which opens the *Address History* page.



11. Enter the correct date in the EFFECTIVE DATE field on the *Address History* page.



12. Select **OK**.

Correcting the Start Date in Manage Job

Navigation

Dashboard: Workforce Administration; **Tile:** Manage Human Resources; Manage Job

From the **Manage Job** page:

1. Enter the EMPL ID field.

The screenshot shows the 'Manage Job' search interface. Under 'Search Existing', there are various search criteria fields. The 'EMPL ID' field is highlighted with a red box. The 'Correct History' checkbox is also highlighted with a red box. The 'Search' button is highlighted with a yellow box.

2. Select the **Correct History** checkbox.
3. Select **Search**.
The *Job Actions Summary* page displays.
4. Select the **Arrow** icon on the desired employee row.
5. Select **Edit** (pencil icon) on the new hire row.

The screenshot shows the 'Job Actions Summary' page. A table lists job actions for an employee. The 'Edit' icon (pencil) is highlighted with a red box on the new hire row.

Effective Date	Job	Payroll Status / Job	Action / Reason	Job Title	Position	Reports To	Business Unit	Department	Location	Company	Pay Group	Standard Rate	Action
12/06/2024	ADJ	ADJ	ADJ	ADJ	ADJ	ADJ	ADJ	ADJ	ADJ	ADJ	ADJ	ADJ	ADJ

The *Correct Job Data* page displays.

6. Enter the correct date for the **Effective Date**.

The screenshot shows the 'Correct Job Data' dialog box. The 'Effective Date' field is highlighted with a red box and contains the date 12/06/2024. The 'Continue' button is highlighted with a red box.

Note: If a Payroll is currently in process for this employee, data will not be processed until next payroll. Please review the transaction specific details and update the effective date correctly on this page.

*Effective Date: 12/06/2024

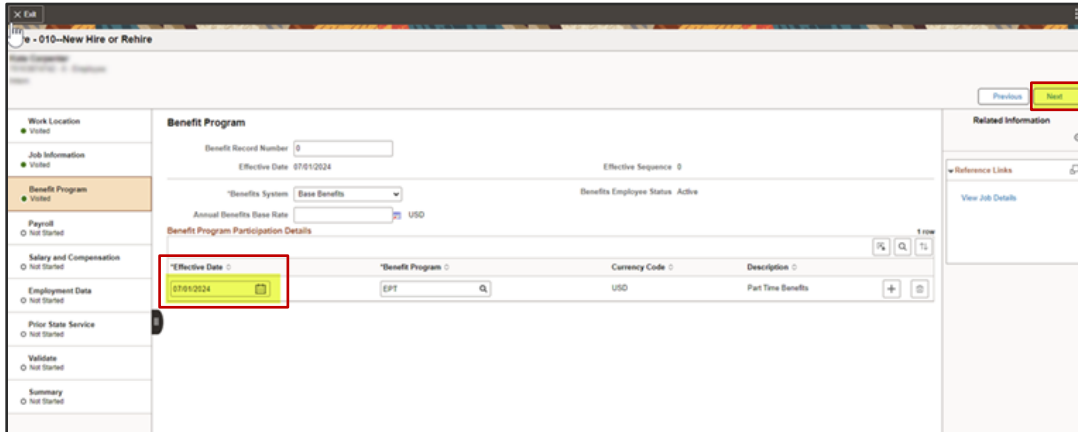
Effective Sequence: 0

*Action: DTA Data Change

Reason: F24 FY 24 Conversion

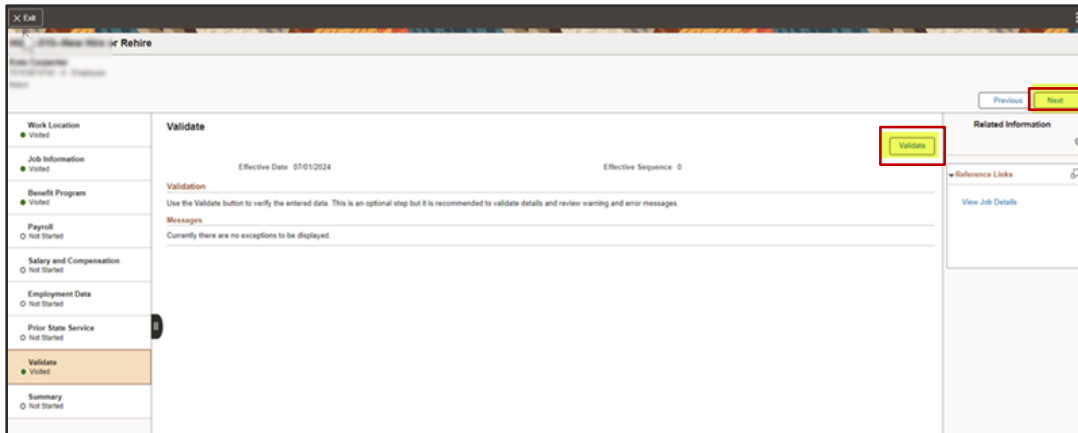
7. Select **Continue**.
8. Select **Next** (which takes you to the Job Information page).
9. Select **Next** again to go to the **Benefit Program** page.

10. Update the **Effective Date**.



11. Select **Next** repetitively to navigate to the **Validate** page.

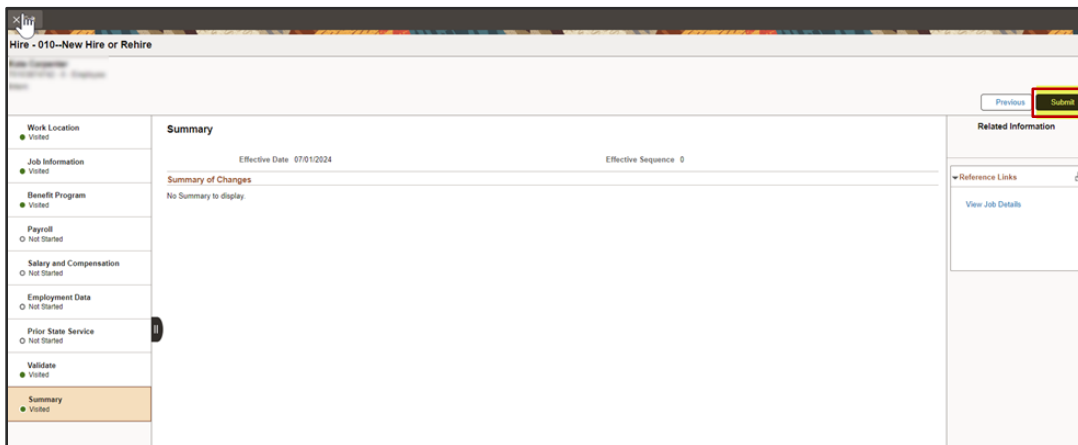
12. Select **Validate** on the screen.



13. Select **Next**.

This automatically navigates to **Summary** in the left-hand menu.

14. Select **Submit**.



Correcting the Start Date in Payroll

Navigation

Dashboard: Payroll & Commitment Accounting; **Tile:** Employee Pay Data

To correct an employee's start date in payroll:

1. Select **Employee Tax Data** in the left-hand menu.
2. Enter the employee's ID the EMPL ID field.

The screenshot shows the 'Update Employee Tax Data' interface. On the left, the 'Employee Tax Data' menu item is selected. The main area contains a search form with fields for 'Empl ID', 'Company', 'Name', 'Last Name', 'Second Last Name', and 'Alternate Character Name'. Each field has a 'begins with' dropdown. At the bottom, there are checkboxes for 'Case Sensitive' and 'Include History', with the 'Correct History' checkbox checked. A 'Search' button is located at the bottom left.

3. Select the **Correct History** checkbox.
4. Select **Search**.
5. Select **Employee Tax Data** in the left-hand menu.
6. Update **EFFECTIVE DATE** to the correct date of hire.

The screenshot shows the 'Tax Data' form. The left-hand menu has 'Employee Tax Data' selected. The main area shows 'Tax Data' for a specific employee. The 'Effective Date' field is highlighted with a red box and contains the date '9/25/2024'. Below this are fields for 'Federal Form Version' and 'Federal Withholding Elements'.

7. Select **Tax Distribution** in the left-hand menu.
8. Update **EFFECTIVE DATE** to the correct date of hire.

The screenshot shows the 'Update Tax Distribution' form. The left-hand menu has 'Tax Distribution' selected. The main area shows 'Tax Distribution' for a specific employee. The 'Effective Date' field is highlighted with a red box and contains the date '9/25/2024'. At the bottom, there is a 'Save' button highlighted with a red box, along with 'Return to Search', 'Notify', and 'Refresh' buttons.

9. Select **Save**.

Correcting the Start Date in Retirement Plans

Navigation

Dashboard: Workforce Administration; **Tile:** Benefits Administration

To correct an employee's start date in retirement plans:

1. Select **Enroll in Benefits** in the left-hand menu.
2. Select **Retirement Plans** under *Enroll in Benefits* in the left-hand menu.
3. Enter the EMPL ID.

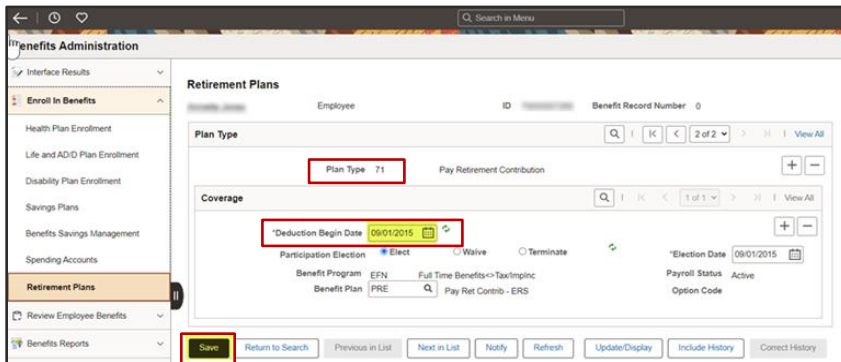
The screenshot shows the 'Benefits Administration' interface. On the left, the 'Enroll in Benefits' menu is expanded, and 'Retirement Plans' is selected. The main area is titled 'Retirement Plans' and 'Find an Existing Value'. Under 'Search Criteria', 'Emp ID' is entered as '7'. The 'Correct History' checkbox is checked. The 'Search' button is highlighted with a red box.

4. Select the **Correct History** checkbox.
5. Select **Search**.
The page opens to record *1 of 2*, Plan Type 70.
6. Correct the effective date in the DEDUCTION BEGIN DATE field on the *Plan Type 70* screen.

The screenshot shows the 'Plan Type 70' screen. The 'Deduction Begin Date' field is highlighted with a red box and shows '09/01/2015'. The '1 of 2' record indicator is also highlighted with a red box. The 'Correct History' checkbox is checked.

7. Select the **arrow** for *1 of 2* to go to record *2 of 2*, Plan Type 71.

- Correct effective date in the DEDUCTION BEGIN DATE field on *Plan Type 71* screen.



- Select **Save**.

Correcting State Date in Time and Labor

To correct the employee's start date in the Time and Labor modules, authorized agency support staff must submit an LOA by:

- Contacting the CAPPS Service Desk at: (512) 463-2277.
- Adding the LOA as an attachment in the CAPPS Service Desk ticketing system.
- Sending an encrypted email with the LOA as an attachment to: hr.loa@cpa.texas.gov
- Hand-delivering the LOA to: Texas Comptroller of Public Accounts, LBJ State Office Building, Fiscal Management/Mainframe Production Support Section, 111 E. 17th St., Austin, Texas 78774
- Faxing the LOA to: (512) 475-0887.

Revision History

Date	Description of Change	Changed By
Dec. 6, 2024	Initial Release	K. Griffin