

## CAPPS Desk Aid

# Entering Employment Action

**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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# Entering Employment Action

## Overview

In CAPPS, most employment actions are a two-part process. First, the position number attributes need to be updated in the **Manage Position** module. Second, the employment action and job attributes are entered in the **Manage Job** module.

Users need to enter the employment action in **Manage Job** using a reason code and adjust the employee's comp rate and other applicable details. If the employee is *changing* position numbers, the new position number must have already been setup before users can enter the new position number in **Manage Job**. In some cases, employment actions do not require updating the **Position Management** module and those can be entered in the **Manage Job** module only. As a rule, if an attribute to the position number is being changed, then it must be made in the **Position Management** module first before the employment action can be entered in the **Manage Job** module.

Examples:

- **Reason code 020, Promotion** — First, this action requires the position number to be updated with new job code in the **Manage Position** module first. Second, the employment action is entered in the **Manage Job** module.
- **Reason code 025, Merit Increase** — This action does not require entry in the **Manage Position** module since the only attribute changing is the compensation rate located in **Manage Job** module. The employment action can be entered directly in the **Manage Job** module.

## Reason Codes Definitions and Restrictions

Enter employment actions using a reason code that defines the action that is taking place. Agencies must ensure employment actions entered in CAPPS are aligned with the definitions and restrictions in [Reason Code Resources and Classification Salary Schedule \(FPP R.022\)](#).

## Additional Reference

Users should also reference the State Auditor's [Texas Human Resources Management Statutes Inventory](#).

## Prerequisites

This desk aid is a basic outline of the steps, navigation (including screen images) for entering an employee action in CAPPS — it is not intended to replace internal agency training.

Information needed to complete an employment action:

- EFFECTIVE DATE of the employment action
- EMPLOYEE ID
- NAME to validate
- Amount of the salary increase, decrease or if it remains the same
- New POSITION NUMBER (if applicable)
- New JOB CODE (if applicable)
- Salary grade to validate

## Updating or Managing a Position

### Navigation

**Dashboard:** Workforce Administration, Manage Human Resources, Manage Position

**Navbar:** Main Menu, Organizational Development, Position Management, Manage Position

1. Enter the POSITION NUMBER.  
 –or–  
 Use the magnifying glass to search by other criteria (if position number is unknown).
2. Select **Search**.

3. Select **Add Row** to insert a newly effective date row.

4. Enter the EFFECTIVE DATE of the employment action that will be entered in *Manage Job*.
5. Populate the REASON CODE field with the UPD.  
 –or–  
 Use the magnifying glass to search for the UPD.

6. Select **Continue**.
7. Update the JOB CODE field with the new job code from the *Position Data* page.

- Make any additional necessary updates to other position attributes (such as LOCATION, DEPARTMENT, REPORTS TO).

This screenshot shows the 'Step 1 of 5: Position Data' section of the system. The 'Next' button in the top right corner is highlighted with a red arrow and a red box. The form includes fields for Effective Date (04/01/2022), Reason Code (UPD - Update Position), and various position attributes like Status (Active), Max Head Count (1), and Job Sharing Permitted (No).

- Select **Next**.

- Select **Next** on the *Additional Information* section.

This screenshot shows the 'Step 2 of 5: Additional Information' section. The 'Next' button in the top right corner is highlighted with a red arrow and a red box. The form includes fields for Education and Government, Encumber Salary Amount, and FTE (1.00000).

- Select **Next** on the *Budget Incumbents* section.

This screenshot shows the 'Step 3 of 5: Budget Incumbents' section. The 'Next' button in the top right corner is highlighted with a red arrow and a red box. The form displays a table for Current Budget (Earnings: 0.000, Deductions: 0.000, Tax: 0.000) and options to update incumbents.

- Update fields (as necessary) for REPORTING INDICATOR, POSITION ALLOCATION, POSITION FUNCTION and/or MONTHLY BUDGET AMOUNT, in the *Position and Reporting details* section.

This screenshot shows the 'Step 4 of 5: Position and Reporting details' section. The 'Next' button in the top right corner is highlighted with a red arrow and a red box. The 'Reporting Indicator', 'Position Allocation', and 'Position Function' fields are highlighted with a red box. The form includes fields for Company, Department, Job Code (0155A), and Monthly Budget Amount (0.00).

- Select **Next**.

- Review these changes on the *Review and Submit* page for accuracy.

15. Select **Previous** to revisit prior pages and adjust values previously entered (if necessary).

—or—

Select **Submit**.

Current Head Count: 1 of 1

Step 5 of 5: Review and Submit

Effective Date: 04/01/2022 Reason Code: UPD - Update Position  
 Effective Sequence: 0 Approval Status: Not Available

Summary Of Changes

Description	Proposed Value	Current Value
Description	Administrative Assistant V	Administrative Assistant
Short Description	Adm As V	Adm As IV
Action Date	04/18/2022	12/07/2021
Job Code	0158A	0156A
Salary Grade	17	15
Description	Admin Assnt V	Admin Assnt IV

16. Select **OK** on the warning message that displays informing agencies that no updates are made to incumbent data — this is due to the fact that changes must to be entered in **Manage Job** for the incumbent employees.

Warning - No updates will be made to incumbent data.  
 Position data related to job code, compensation, company, business\_unit or classified indicator has been changed.  
 Incumbent job data will not be automatically updated. If the change is to be applied to incumbent job data, continue Position Data save process then proceed to Workforce Administration> Job Information> Job Data and enter the change there.  
 Press OK to continue save process.

After a successful save, a message displays indicating that the position number was successfully updated.

Position Confirmation

✓ The Position Number [redacted] has been successfully updated.

Position Number [redacted]  
 Headcount Status: Filled  
 Current Head Count: 1 of 1

Go to Position Details | Go to Manage/Create Position

## Entering an Employee Action

### Navigation

**Dashboard:** Workforce Administrations, Manage Human Resources, Manage Job

**NavBar:** Workforce Administration, Job Information, Manage Job

1. Enter the EMPL ID field.

—or—

Search by other criteria if employee’s ID is unknown.

2. Select **Search**.

Manage Human Resources | Manage Job

Search Existing

Search Criteria

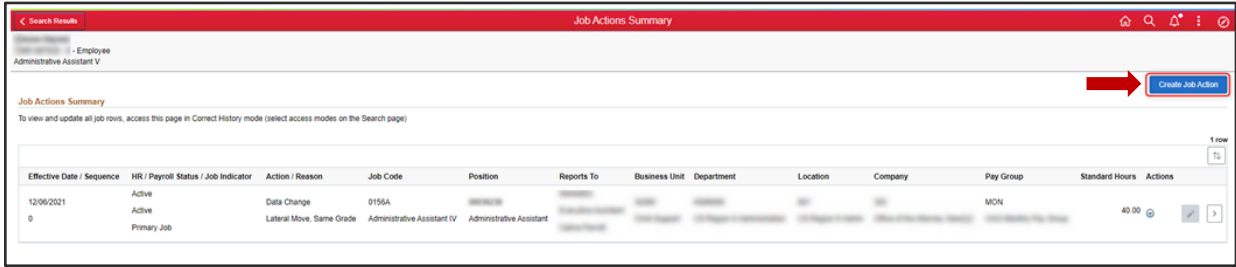
Empl ID: begins with [7] [ ]  
 Name: begins with [ ] [ ]  
 Second Last Name: begins with [ ] [ ]  
 Middle Name: begins with [ ] [ ]  
 Business Unit: begins with [ ] [ ]  
 Department: begins with [ ] [ ]

Empl Record: = [ ] [ ]  
 Last Name: begins with [ ] [ ]  
 Alternate Character Name: begins with [ ] [ ]  
 Organizational Relationship: begins with [ ] [ ]  
 Department Set ID: begins with [ ] [ ]  
 Company: begins with [ ] [ ]

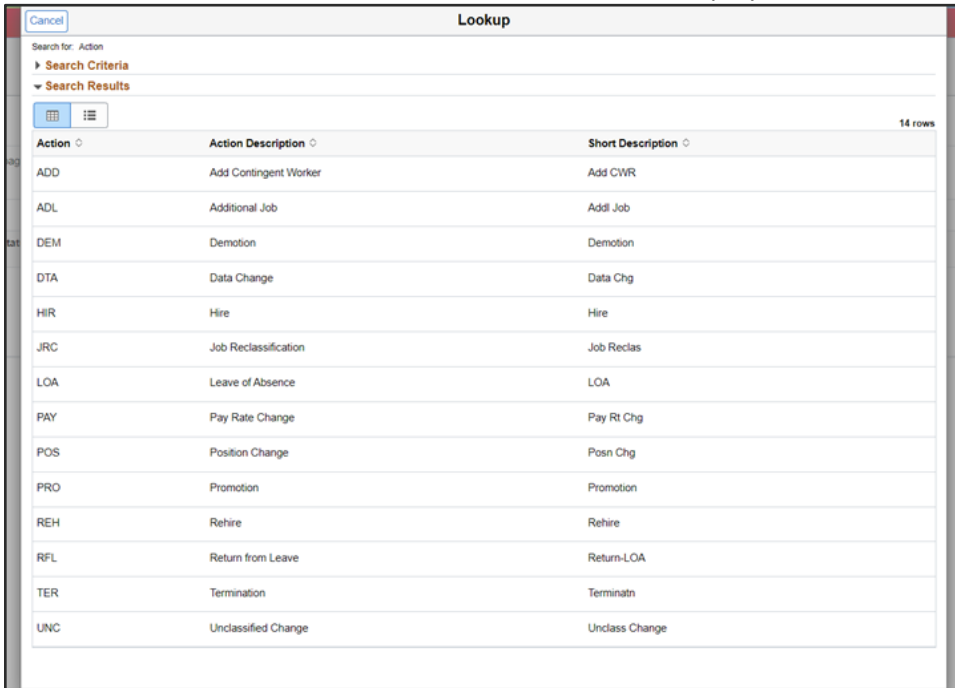
Include History  Correct History

Search | Clear

- Verify that it is the correct person by NAME and EMPL I D.
- Select **Create Job Action** on the *Job Summary* page.



- Enter the EFFECTIVE DATE that aligns with the date of the employment action.
- Search for and choose the ACTION associated with the employment action.



**Note:** Action codes are the types of reason codes that can be entered. The list of reason codes are populated based on the type of action that is selected.

- Select the REASON CODE  
 –or–  
 Search for the reason code using the magnifying glass.
- Select **Continue**.



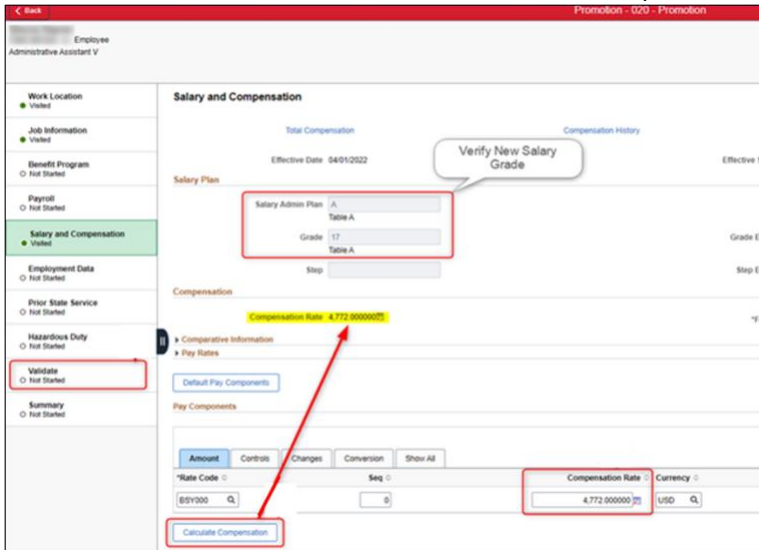
**Note:** The list of reason codes that displays depends on the type of action code used. See [Reason Code Resources and Classification Salary Schedule \(FPP R.022\)](#) for lists of all available reason codes.

- Ensure the attributes update the position record by removing the position number and press the **tab** key to move out of the field.
- Enter the position number again.

- Select **Next** on the *Work Location* section.

- Validate the correct job attributes are displayed on the *Job Information* section.
- Select the **Salary and Compensation** section in the left-hand menu (skipping the *Benefits Program* and *Payroll* sections).

14. Enter the COMPENSATION RATE field with the new (full monthly) salary under *Pay Components*.



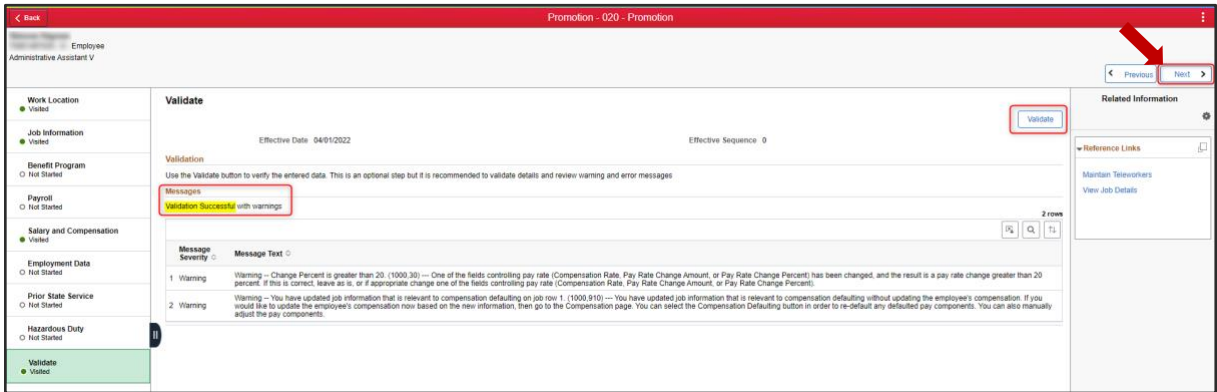
15. Select **Calculate Compensation**.

16. Select the **Validate** section in the left-hand menu (skipping the *Employment Data*, *Prior State Service*, and if applicable *Haz Duty* sections).

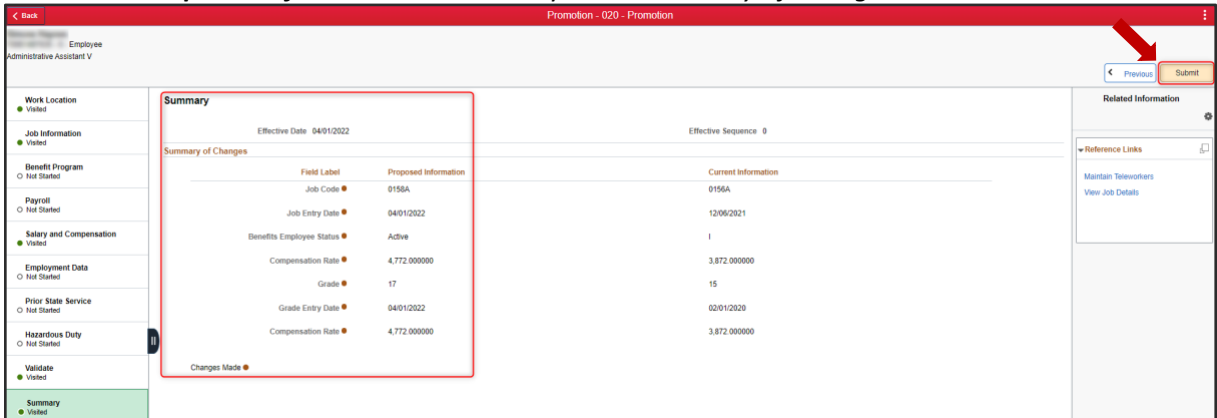
17. Select **Validate**.

18. Verify that the **Validation Successful** displays under *Messages* section.

19. Select **Next**.



20. Review the **Proposed Information** for accuracy in the *Summary of Changes* section.



21. Select **Submit**.

## Revision History

Date	Description of Change	Changed By
Sept. 16, 2024	Initial release.	K. Griffin