



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

## Custom Hire

**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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# Custom Hire

## Overview

CAPPS provides a method to hire an employee using a custom process and page(s) to bring the employee into CAPPS. This document is intended as a brief reminder of the steps, navigation and screens used to complete the CAPPS Custom Hire process — however, it is not intended to replace training.

There are two types of hiring processes addressed in this desk aid:

- **Classic Hire** process — used when hiring an employee who has never worked at your agency.
- **Fluid Hire** process — used when rehiring an employee into your agency who already has a CAPPS profile with your agency.

## Prerequisite

Information required to complete the hire process in CAPPS:

- Hire Date (Start Date)
- Social Security Number
- Name
- Birth Date
- Gender
- Address
- Ethnic Group
- Military Status (Veterans Status and Preference)
- Position Number
- Salary
- Education Level (optional)
- Marital Status (optional)

Much of this data is visible to the employee on **My Profile** section. For example, if the Education Level is entered the employee will see the Education Level in Employee Self Service.

## Brand New Employee to CAPPS — Classic Hire Process

### Navigation

**Dashboard:** Workforce Administration; **Tile:** New Hire, CAPPS Custom Hire

**NavBar:** Workforce Administration, Job Information, CAPPS Custom Hire

### Classic Hire — on the CAPPS Custom Hire Page

1. Navigate to the **CAPPS Custom Hire** page.

2. Enter the new hire’s Social Security number in the NATIONAL ID field.

The following warning message displays:

Reminder – New hires should not be onboarded prior to their first day physically reporting to work. Please review the new hire’s official documents (Social Security card or I-9) to confirm the National ID entered. If SSN is correct, click **OK** to confirm no changes are required or **Cancel** to return to the field and revise what has been entered.

**Note:** It is critical to ensure the new hire’s SSN is entered correctly. New hire records saved with an incorrect SSN cannot be corrected by the agency — a ticket must be opened with CAPPS Production Support for assistance.

3. Enter the SSN again in the CONFIRM NATIONAL ID field to validate the correct new hire’s SSN number.
4. Select **OK** if the SSN is correct. If the SSN is **not** correct, select **Cancel** and correct the SSN in both fields.
5. Enter the 3-digit agency number in the COMPANY field.
6. Enter (or select from the calendar icon) the HIRE DATE field.
7. Select **Continue**.  
Web Services runs behind the scenes to check the SSN against all other state agencies. It may take a moment to display the screen while the process runs.
8. Select **Add Name**.
9. Complete the FIRST, MIDDLE and LAST NAME fields and select suffixes, if needed.
10. Select **Refresh Name**.
11. Select **OK**.

- Verify new hire's date of birth and enter that date in the DATE OF BIRTH (DOB) field (or select that date from the calendar icon).

**Note:** Ensure the DOB is entered correctly because CAPPS calculates some benefits based on the DOB.

- Do **NOT** select the COMMISSIONED PEACE OFFICE checkbox (which is automatically checked ON if the employee was ever a Commissioned Peace Officer [CPO]).

The screenshot shows a form with two main sections. The first section, 'Biographic Information', includes fields for Date of Birth (0 Years 0 Months), Birth Country (USA), Birth State, and Birth Location. A checkbox labeled 'Commissioned Peace Officer' is checked. The second section, 'Info Release Indicators', is highlighted in yellow and contains several dropdown menus for release permissions: Home Address Release, SSN Release, Emergency Contact Info Rel, Home Telephone Release, Family Info Release, and Protect Indicator (set to 'Not Protected').

- Select all applicable **Info Release Indicators** in the drop-down menus.

**Note:** Depending on the agency and/or employee, some employees have a PROTECT INDICATOR value displayed.

- Select the GENDER in the drop-down menu (Required).
- Select the HIGHEST EDUCATION LEVEL in the drop-down menu (Optional).

The screenshot shows the 'Biographical History' section of the form. It includes a search bar, navigation controls, and a 'View All' link. The main content area contains several fields: Effective Date (12/19/2023), Gender (Male), Highest Education Level (HS Graduate or Equivalent), Marital Status (Unknown), Language Code, Alternate ID, and As of (06/18/2007). A checkbox for 'Full-Time Student' is also present.

- Select the **Contact Information** tab.

- Select **Add Address Detail**.

**Note:** The EFFECTIVE DATE (Hire Date) and COUNTRY (USA) autopopulate.

- Select **Add Address**.
- Enter all address information.
- Select the employee's COUNTY OF RESIDENCE in the drop-down menu.
- Select **OK**.
- Select **OK** again.

- Enter the employee's PHONE TYPE and PHONE NUMBER fields and check the **Preferred** box. If more phone numbers are needed, select the plus icon (+) to add an additional row. However, only one phone number can be designated as the preferred number.

The screenshot shows the 'Contact Information' tab with the following details:

- Current Addresses:** A table with columns: Address Type, As Of Date, Status, Address. One row is visible: Home, 12/19/2023, A, [Redacted] 015.
- Phone Information:** A table with columns: Phone Type, Telephone, Extension, Preferred. One row is visible: Personal Cell, [Redacted], [Redacted], .
- Email Addresses:** A table with columns: Email Type, Email Address, Preferred. No rows are visible.

**Note: DO NOT** enter any type of email address as a part of the CAPPS Classic Hire process. This type of information can be updated **after** completing the new hire process. If your agency is using the email interface, the business email is updated by the interface. Otherwise, enter the business email (and other personal data) by returning to this screen **after** the new hire process is complete.

- Select the **Regional** tab.

**Note:** The REGULATORY REGION field should default to **USA**.

- Select the **look up** (magnifying glass) icon next to the ETHNIC GROUP field (required) and choose the appropriate ETHNIC GROUP in the drop-down menu.

**Note:** "NSPEC" is not a valid menu option. If no other selections apply, you may select **Multi**.

- Enter the MILITARY STATUS field.

- Choose the applicable checkbox indicators in the **Texas Application** section.

The screenshot shows the 'Texas Application' section with the following details:

- Effective Date:** 11/09/2023
- Checkboxes:**
  - Orphan of Veteran
  - Foster Youth
  - Spouse of Veteran
  - Selective Service
  - Spouse Member
  - Spouse Primary

- Select the **Organization Relationships** tab, which defaults to the *Org Relationship of Employee*.

- Select **Add Relationship**.

The screenshot shows the 'Organizational Relationships' tab with the following details:

- Choose Org Relationship to Add:**
  - Employee
  - Contingent Worker
  - Person of Interest
- Add Relationship** button

- Select the **Work Location** tab.

32. Enter the HIRE REASON CODE field (or use the **look up** [magnifying glass] icon on the right of the field to search applicable codes).
33. Enter the POSITION NUMBER field and press the **Tab** key.

Many of the remaining fields autopopulate after the POSITION NUMBER field is entered, such as the:

- REGULATORY REGION field
- COMPANY field
- BUSINESS UNIT field
- DEPARTMENT field
- DEPARTMENT ENTRY DATE field
- LOCATION field

The screenshot shows a form with the following fields and values:

- HR Status: Active
- Payroll Status: Active
- Reason Code: [Search icon]
- \*Job Indicator: Primary Job
- Calculate Status and Dates button
- Position Number: [Search icon]
- Override Position Data button
- Position Entry Date: [Calendar icon]
- Position Management Record checkbox
- \*Regulatory Region: USA (United States)
- \*Company: [Search icon]
- \*Business Unit: 304TX (CPA Core SETID)
- Department: [Search icon]
- Department Entry Date: [Calendar icon]
- \*Location: [Search icon]

34. Select the **Work Location** tab.
35. Verify that the work location assigned to the new hire has the correct work location data.

**Note:** The ESTABLISHMENT ID is **not** used in CAPPS.  
**DO NOT** enter the RETIREMENT CODE field. During CAPPS new hire processing, information is retrieved from the ERS and SPRS to determine the correct retirement code. Do not change the retirement code without consulting with the ERS, as this is the agency that determines correct retirement code.

The screenshot shows the 'Work Location' tab for an employee with Empl ID 79003940495. The form displays the following details:

- Effective Date: 12/19/2023
- Effective Sequence: 0
- Action: Hire
- HR Status: Active
- Reason Code: [Search icon]
- Payroll Status: Active
- \*Job Indicator: Primary Job
- Calculate Status and Dates button
- Position Number: [Search icon]
- Override Position Data button
- Position Entry Date: [Calendar icon]
- Position Management Record checkbox
- \*Regulatory Region: USA (United States)
- \*Company: [Search icon]
- \*Business Unit: 304TX (CPA Core SETID)
- Department: [Search icon]
- Department Entry Date: [Calendar icon]
- \*Location: [Search icon]
- Establishment ID: [Search icon]
- Date Created: 01/17/2024
- Last Start Date: 01/17/2024
- Expected Job End Date: [Calendar icon]
- Agency Transfer From
- Agency Transfer To
- Retirement Code: [Dropdown menu]

36. Select the **Job Information** tab.

37. Verify that the position assigned to the new hire has the correct position data, such as in the:

- JOB CODE field
- REPORTS TO field
- STANDARD HOURS field
- FTE field

**Note:** If the information is not accurate, you may need to manually enter the correct position data. Please verify the position data before completing the new hire process (through the CAPPS Classic Hire Process) to ensure that updates were made to the position data.

38. Select the **Payroll** tab.

39. Enter (or verify, if already populated with a value) the **PAY GROUP** field.

40. Verify the payroll information.

41. Select the **Salary Plan** tab.

**Note:** The Employee Tax Data (W 4 information) defaults to a value of *single* and *zero*. This information can be updated by the employee later through **Employee Self Service** after the hire is complete.

42. Verify the applicable SALARY ACTION PLAN, GRADE, and STEP fields.

43. Select the **Compensation** tab.

44. Enter the employee’s compensation value in the COMPENSATION RATE field.

45. Select **Calculate Compensation** and verify that the salary rate is correct.

**Note:** If you are hiring a part-time employee, ensure the STANDARD HOURS are correct (in the **Position Data** area) before processing the new hire.  
**Example:** Enter the *STANDARD HOURS* (in the **Position Data** area) to **20** if the employee is scheduled to work 20 hours per week. Enter the employee’s monthly salary rate at the full-time rate for 40 hours per week. Click **Calculate Compensation** and CAPPS prorates the salary accordingly.

46. Click **OK** to save the hire record.

## Rehire a Prior Employee — Fluid Hire Process

### Navigation

**Dashboard:** Workforce Administration; **Tile:** New Hire, CAPPS Custom Hire

**NavBar:** Workforce Administration; Job Information; CAPPS Custom Hire

### Fluid Hire — on the CAPPS Custom Hire Page

1. Navigate to the **CAPPS Custom Hire** page.
2. Enter the new hire’s Social Security number in the NATIONAL ID field.
3. Enter the 3-digit agency number in the COMPANY field.
4. Enter the HIRE DATE field (or select the hire date from the calendar icon).
5. Select **Continue**.

The screenshot shows the 'CAPPS Custom Hire' form. It has a red header bar with a back arrow and the text 'CAPPS Custom Hire'. Below the header, the form title 'CAPPS Custom Hire' is displayed. The form contains several input fields: 'National ID', 'Confirm National ID', '\*Company' (with a search icon), '\*Hire Date' (with a calendar icon), 'Empl ID', 'Name', and 'Empl Record' (with the value '0'). There is also a checkbox for 'Dual Employment Hire'. A yellow 'Continue' button is located at the bottom of the form and is highlighted with a red rectangular box.

The following message displays:

*The EmplID you have entered should already exist. Are you sure you want to use this EmplID?*

The screenshot shows a modal dialog box with a grey border. The text inside reads: 'The EmplID you have entered already exists. Are you sure you want to use this EmplID? (18032,1550)'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red rectangular box.

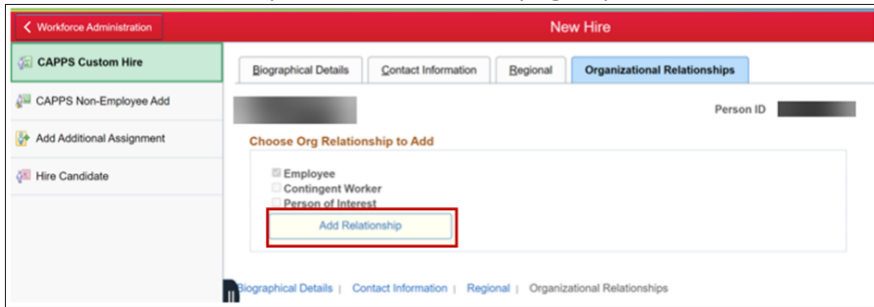
6. Select **OK**.
7. Select **Continue**.  
Web Services runs behind the scenes to check the SSN against all other state agencies. It may take a moment to display the screen while the process runs.
8. Select the Biographical Details tab.
9. Verify personal information and update **Info Release Indicators**.
10. Select the Contact Information tab.
11. Verify and update current addresses and phone numbers.

**Note: DO NOT** enter any type of email address as a part of the CAPPS Custom Hire process. This type of information can be updated **after** completing the new hire process. If your agency is using the email interface, the business email is updated by the interface. Otherwise, enter the business email (and other personal data) by returning to this screen **after** the new hire process is complete.

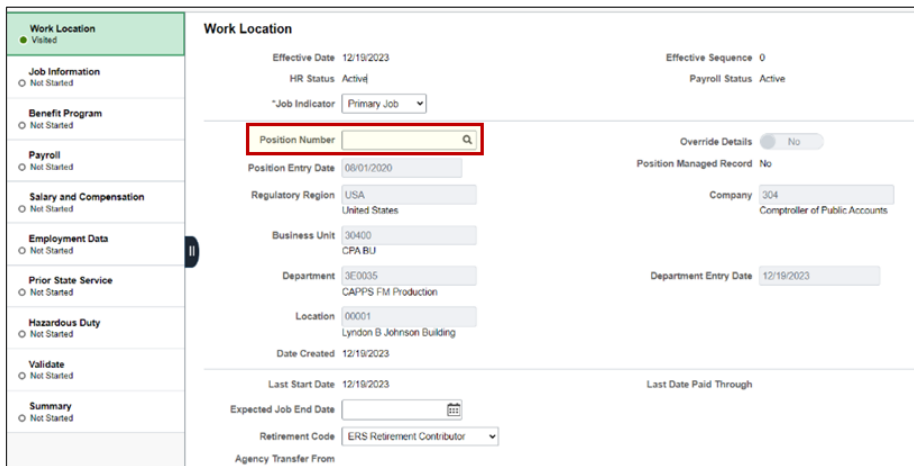
**Note:** If the EMAIL ADDRESS is already populated, do not update or remove until **after** saving the new hire process is complete.

12. Select the **Regional** tab.
13. Verify ethnic and veteran information.

14. Select the **Organization Relationships** tab, which defaults to the *Org Relationship of Employee*.
15. Select Add Relationship and the *Create Job* page opens.



16. Enter the HIRE REASON CODE field (or use the **look up** icon/magnification glass on the right of the field to search applicable codes).
17. Select **Continue**.
18. Select **Work Location**.
19. Enter the POSITION NUMBER field and press the **Tab** key.  
Many of the remaining fields autopopulate after the POSITION NUMBER field is entered, such as the:
  - REGULATORY REGION field
  - COMPANY field
  - BUSINESS UNIT field
  - DEPARTMENT & DEPARTMENT ENTRY DATE fields
  - LOCATION field



**Note:** Verify that the position assigned to the new hire has the correct position data (such as in the JOB CODE, SALARY GROUP, LOCATION and DEPARTMENT ID fields).  
If the information is not accurate, you may need to manually enter the correct position data. Please verify the position data **before** completing the new hire process (through the CAPPS Fluid Hire Process) to ensure that updates were made to the position data.  
**DO NOT** enter the RETIREMENT CODE field. During CAPPS new hire processing, information is retrieved from the ERS and SPRS to determine the correct retirement code. The retirement code should not be changed without consulting with the ERS, as this is the agency that determines correct retirement code.

20. Select **Next** in the top right-hand corner to move to the **Job Information** section.
21. Verify the data on the *Job Information* page is correct.

22. Select **Next** in the top right-hand corner to move to the *Benefits Program* page.
23. Verify the data on the *Benefits Program* page is correct.

**Note:** No **not** change the ABBR amount in CAPPS. If the ABBR amount needs to be changed, contact ERS so they can update the amount manually to ensure the amount updates to CAPPS through the daily file.

24. Select **Next** in the top right-hand corner to move to the *Payroll* page.
25. Enter the PAY GROUP field, if it is not autopopulated (or use the **look up** icon/magnifying glass on the right of the field to search for the correct value.

Once the PAY GROUP field is entered, the *Employee Type* field autopopulates —but you should verify that the value is correct.

**Note:** The Employee Tax Data (W 4 information) defaults to a value of *single* and *zero*. This information can be updated by the employee later through **Employee Self Service**, after the hire is complete.

26. Select **Next** in the top right-hand corner to move to the *Salary and Compensation* page.
27. Verify the data in the applicable SALARY PLAN, GRADE and STEP fields.
28. Enter the employee’s compensation value in the COMPENSATION RATE field.

**Note:** Always use the full monthly salary.

29. Select **Calculate Compensation**.

30. Select **Next** in the top right-hand corner, which opens the *Employment Data* page.

- Verify RTW Information (returned by Web Service), if applicable.

**Organizational Assignment Data**

**Instance Record**

Last Assignment Start 12/19/2023 First Assignment Start 08/01/2020

Assignment End Date Home/Host Classification Home

State Service Effective Date 09/28/1996 Agency Service Date 08/01/2020  
27 Years 2 Months 21 Days 3 Years 4 Months 18 Days

Time/Labor LWOP Months 0 Leave of Absence Months 0

6 Months Cont. Svc Indicator  Yes 6 Months Cont. Svc Date 01/19/1993

Probation Date 06/19/2024

Last Verification Date

Business Title Systems Analyst VI

**RTW Information**

Retiree Indicator  No RTW Date

RTW BRP Elig RTW Lngvty Elig

RTW Serv Dt RTW Lngvty Amt

- Select **Next** in the top right-hand, which opens the *Prior State Service* page.
- Make any necessary updates to the *Prior State Service* page and/or the **Hazardous Duty** page (only after the new hire has been saved).

**Prior State Service**

Effective Date 12/19/2023 Effective Sequence 0

Total Prior State Service Years 23 Months 10 Days 5 Total Days 8708 Total Days for Recalculation 8708

*Agency	*Hire Date	*Term Date	Years	Months	Days	LOA Months	TL LWOP Months	Total Days	Comment
1 324	07/20/1992	08/31/1993	1	1	12	0	0	408	No overlap
2 324	09/01/1993	08/05/1997	3	11	5	0	0	1435	No overlap
3 530	10/15/2001	06/31/2003	1	7	17	0	0	594	No overlap
4 529	06/01/2003	09/17/2006	3	3	17	0	0	1205	No overlap
5 530	09/18/2006	06/30/2009	2	9	13	0	0	1017	No overlap
6 529	07/01/2009	10/31/2017	8	4	1	0	0	3045	No overlap
7 530	11/01/2017	07/31/2020	2	9	1	0	0	1004	No overlap

- Select **Next** in the top right-hand corner, which opens the *Validate* page.
- Select **Validate** in the right-hand corner.
- Verify that the *Validation Successful* message displays in the *Messages* area.

**Validate**

Effective Date 12/19/2023 Effective Sequence 0

Validation

Use the Validate button to verify the entered data. This is an optional step but it is recommended to validate details and review warning and error messages

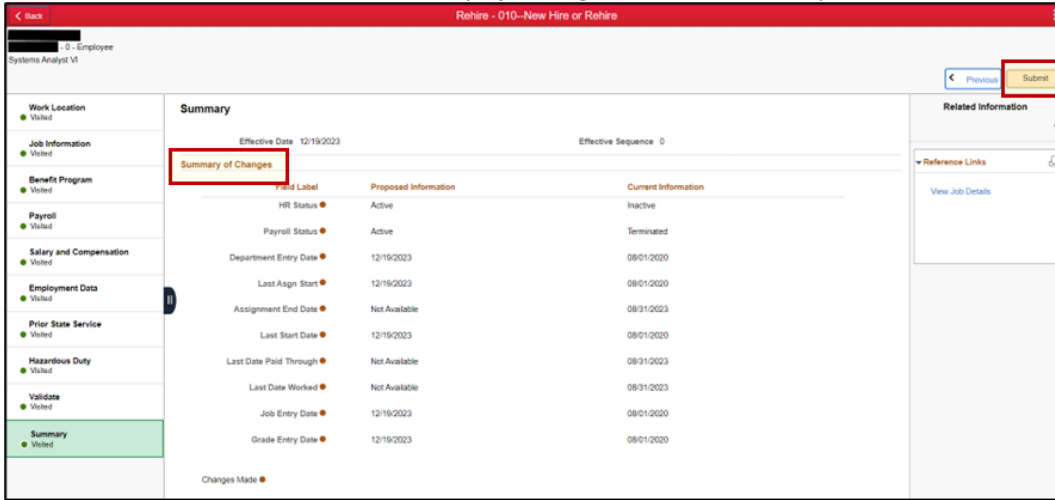
**Messages**

If errors there are no messages to be displayed

**Next**

- Select **Next** in the right-hand corner.

38. Review the information in the *Summary of Changes* area for accuracy.



39. Select **Submit**.

## Prior State Service/Hazardous Duty

Once the new hire has been saved, updates can be made to the **Prior State Service** or **Hazardous Duty** pages.

There are two ways you can update Prior State Service/Hazardous Duty:

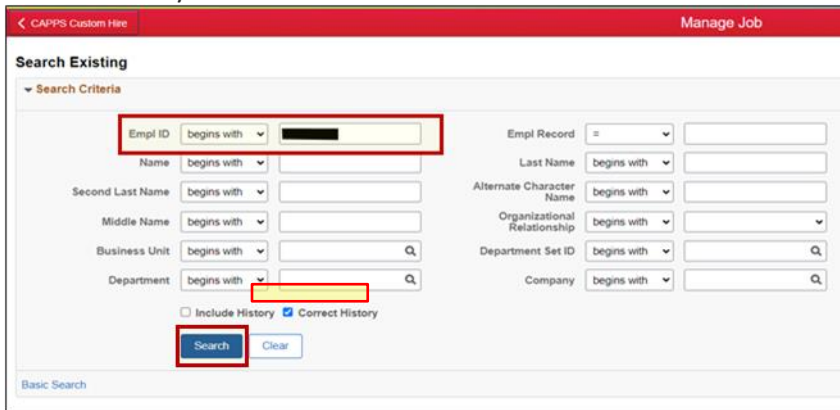
- If you have Correct History access, you can edit the most recent job action to make the appropriate updates.
- If you do not have Correct History access, you will need to add Job Action: DTA-038 to make the appropriate updates.

### Navigation

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

### Updating with Correct History Access

1. Ensure the **Correct History** checkbox is checked ON in the search criteria **before** searching for the employee, since you will make updates to the most recent job action with prior state service or hazardous duty.



2. Enter the EMPL ID field and select **Search**.

3. Select the correct active employee, which takes you to *Job Actions Summary* page.

Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Job Code	Position	Reports To	Business Unit	Department	Location	Company	Pay Group	Standard Hours	Actions
09/01/2023 0	Active Primary Job	Data Change FY 24 Conversion	9940CA DPS Special Agent CID	[Redacted] DPS Special Agent CID	[Redacted] Lieutenant CID	40500 DPS BU	0700C0570 CID Region 6	[Redacted] SAN ANTONIO RH HQ (NEW BRNPLS)	405 Department of Public Safety	MON DPS Monthly Paygroup	40.00	[Pencil Icon]
01/01/2023 0	Active Primary Job	Data Change Legislative Salary Increase	9940CA DPS Special Agent CID	[Redacted] DPS Special Agent CID	[Redacted] Lieutenant CID	40500 DPS BU	0700C0570 CID Region 6	[Redacted] SAN ANTONIO RH HQ (NEW BRNPLS)	405 Department of Public Safety	MON DPS Monthly Paygroup	40.00	[Pencil Icon]

4. Select the pencil icon to the right of the most recent job action row, which opens a pop-up window.
5. Use the **look up** icon/magnify glass to select **REASON 038 Change Non Salary Data**.

**Correct Job Data** [Continue]

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: 02/09/2023

Effective Sequence: 0

\*Action: DTA Data Change

Reason: 038 Change Non Salary Data

6. Select **Continue** in the upper right-hand corner.
7. Select **Prior State Service** in the left menu.

**Prior State Service**

Effective Date: 12/19/2023 Effective Sequence: 0

Total Prior State Service	Years	Months	Days	Total Days	Total Days for Recalculation
0	0	0	0	0	0

*Agency	*Hire Date	*Term Date	Years	Months	Days	LOA Months	TL LWOP Months	Total Days	Comment
1			0	0	0	0	0	0	

8. Make appropriate changes.
9. Select **Hazard Pay Data** in the left menu.

**Hazardous Duty**

Effective Date: 12/19/2023 Effective Sequence: 0

Haz Duty Eff Svc Dt: 03/28/2008

Haz Duty Indicator: Yes Grandfathered Haz Duty: No

Current Haz Duty Svc: 8 Years 3 Months 18 Days Prior Haz Duty Svc: 7 Years 5 Months 4 Days

Current Haz Duty Begin Date: 09/01/2015

Current Haz LOA Months: 0 Current Haz TL LWOP Months: 0

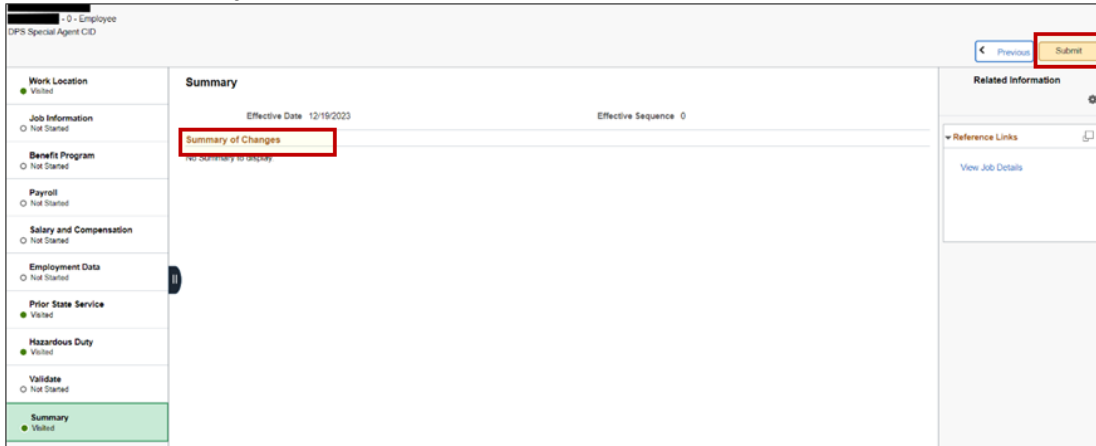
Total Haz Duty LWOP: 0

Total Haz Duty Service	Years	Months	Days	Total Days	Total Days for Recalculation
15	8	22	5745	0	

*Agency	*Begin Date	*End Date	Years	Months	Days	LOA Months	TL LWOP Months	Total Days	Description
1	405	03/28/2008	09/01/2015	7	5	4	0	0	2713 No overlap

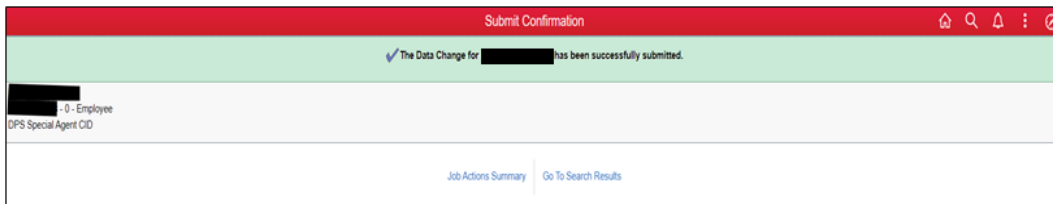
10. Make appropriate changes.

11. Select the **Summary** section in the left menu.



12. Verify the information in the *Summary of Changes* area is accurate.
13. Select **Submit**.

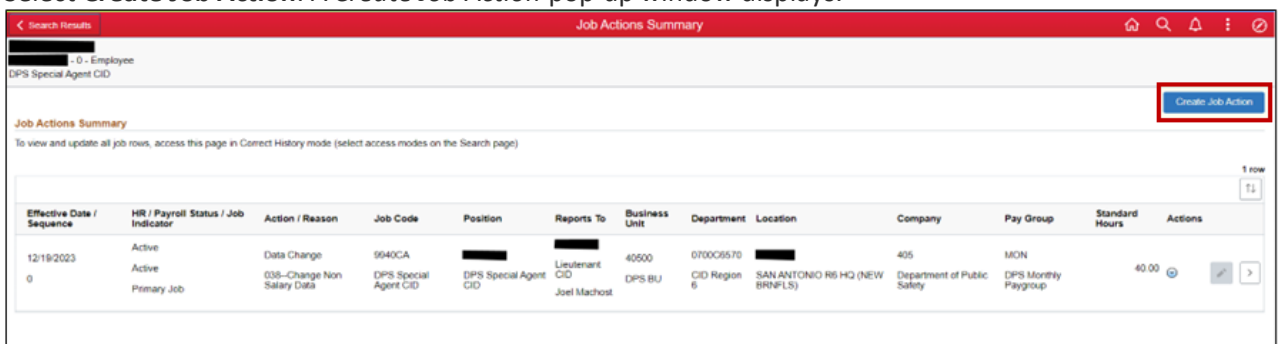
**Note:** A daily process inserts the prior state service row for the most recent period of employment in CAPPS (the last agency the employee worked at in CAPPS). All Prior State Service requires agency validation.



### Updating Without Correct History Access

1. Enter the EMPL ID.
2. Select **Search**.  
The Job Actions Summary page displays.
3. Select **Create Job Action**. A *Create Job Action* pop-up window displays.

**Note:** The *Pencil Icon* (to edit) is greyed out.



4. Enter the **Effective Date** (*this can be the hire date or current date*).
5. Enter action **DTA** with **Reason 038** in the ACTION/REASON field.
6. Select the **Prior State Service** or the **Hazardous Duty** section(s) in the left menu.

7. Make the appropriate updates.
8. Select **Validate** in the left menu.
9. Select **Validate** on the main screen and review the message.
10. Select **Next**.
11. Select **Summary** in the left menu.
12. Select **Submit** on the top right-hand corner.

**Note:** A daily process inserts the prior state service row from the most recent period of employment in CAPPS (the last agency the employee worked at in CAPPS).

All Prior State Service requires agency validation.

## Revision History

Date	Description of Change	Changed By
Dec. 22, 2023	Updated to new template, formatted and edited.	T. Smith
Dec. 8, 2025	Converted to the template with the new CAPPS branding logo/colors.	N/A