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.

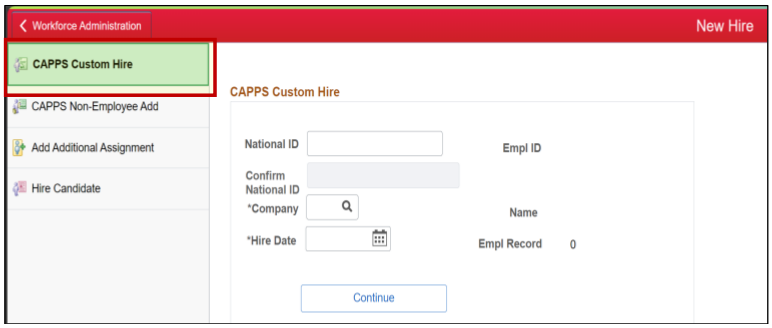
Brand New Employee to CAPPS — Classic Hire Process

Navigation

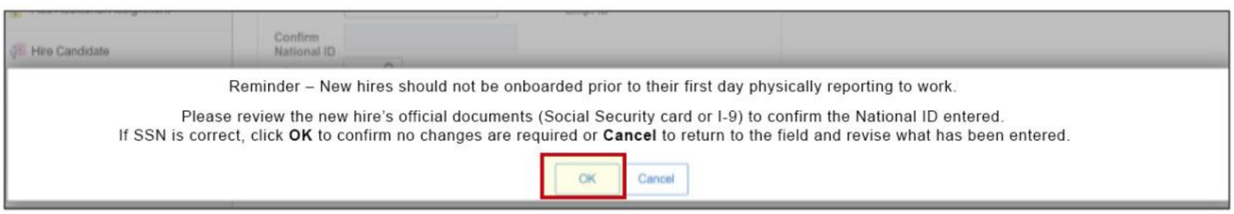
Dashboard: Workforce Administration; **Tile:** New Hire, CAPPS Custom Hire
NavBar: Workforce Administration, Job Information, CAPPS Custom Hire

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.



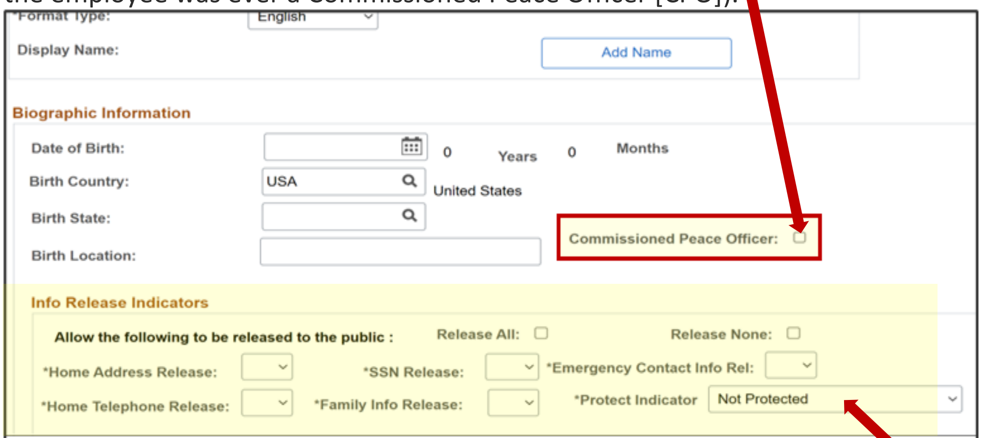
> **Note**: It is critical to ensure the new hire's SSN is entered correctly. New hire records saved with an incorrect SSN cannot be corrected by the agency — a ticket must be opened with CAPPS Production Support for assistance.

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**.

12. 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.

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

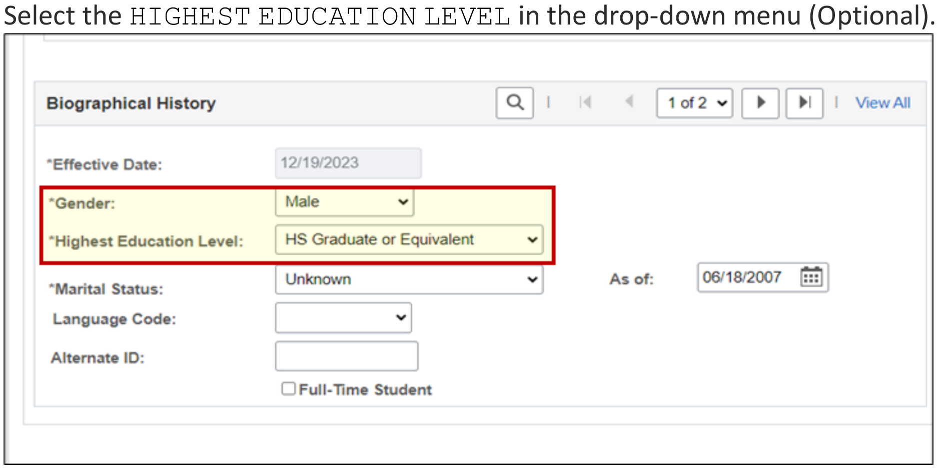


14. Select all applicable ***Info Release Indicators*** in the drop-down menus.

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

15. Select the GENDER in the drop-down menu (Required).

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



17. Select the **Contact Information** tab.

18. Select **Add Address Detail**.

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

19. Select **Add Address**.

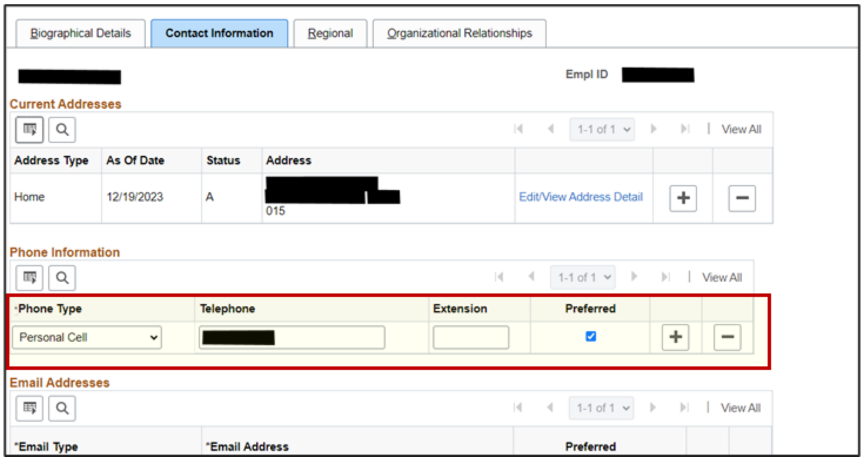
20. Enter all address information.

21. Select the employee's COUNTY OF RESIDENCE in the drop-down menu.

22. Select **OK**.

23. Select **OK** again.

24. 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.



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.

25. Select the **Regional** tab.

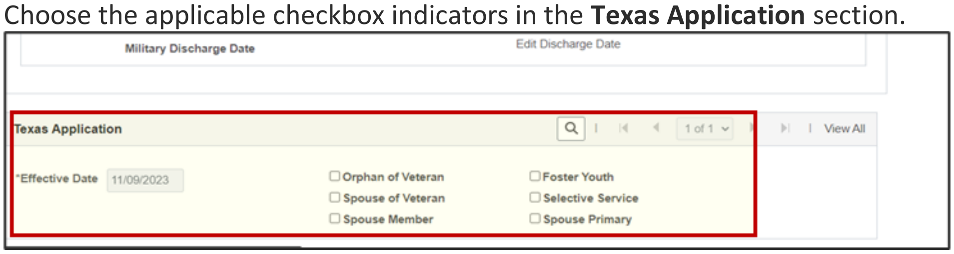
Note: The REGULATORY REGION field should default to **USA**.

26. 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**.

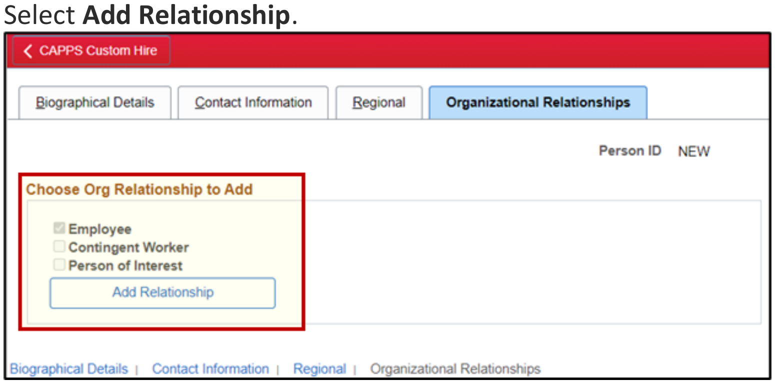
27. Enter the MILITARY STATUS field.

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



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

30. Select **Add Relationship**.



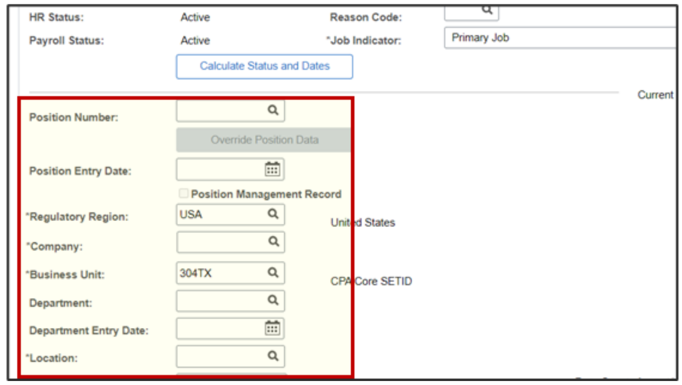
31. Select the **Work Location** tab.

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:

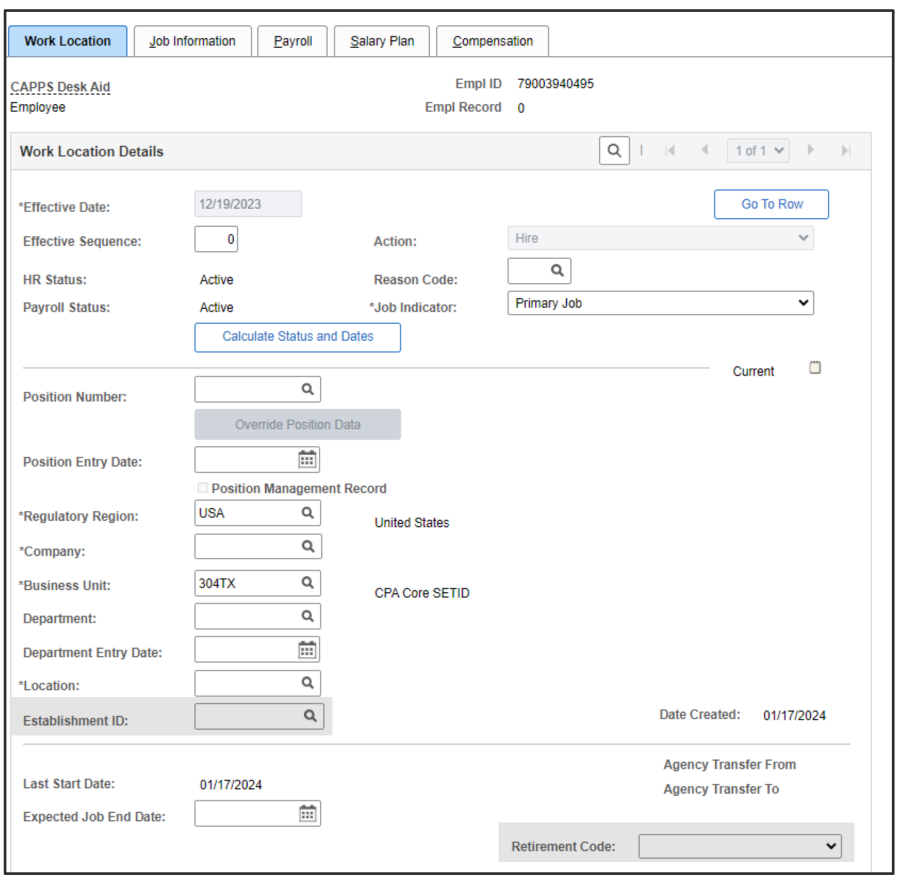
    - REGULATORY REGION field
    - COMPANY field
    - BUSINESS UNIT field
    - DEPARTMENT field
    - DEPARTMENT ENTRY DATE field
    - LOCATION field



34. Select the **Work Location** tab.

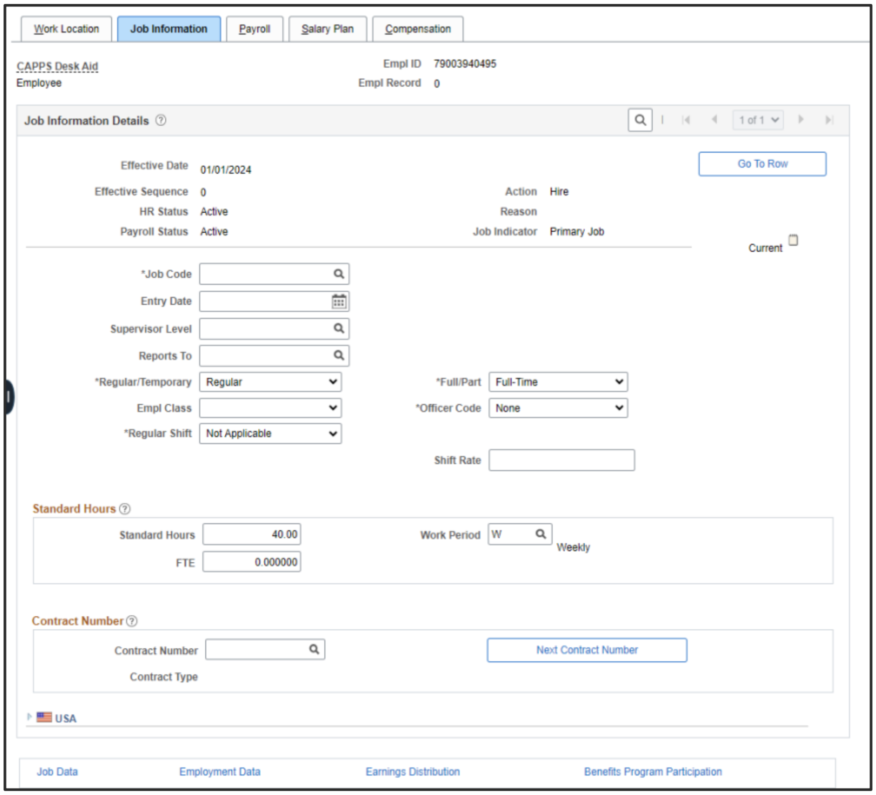
35. Verify that the work location assigned to the new hire has the correct work location data.

> **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.



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

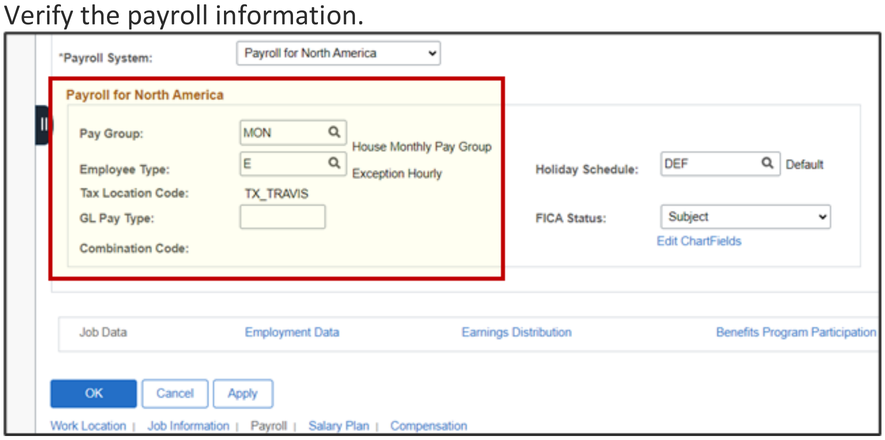


> **Note:** If the information is not accurate, you may need to manually enter the correct position data. Please verify the position data before completing the new hire process (through the CAPPS Classic Hire Process) to ensure that updates were made to the position data.

38. Select the **Payroll** tab.

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

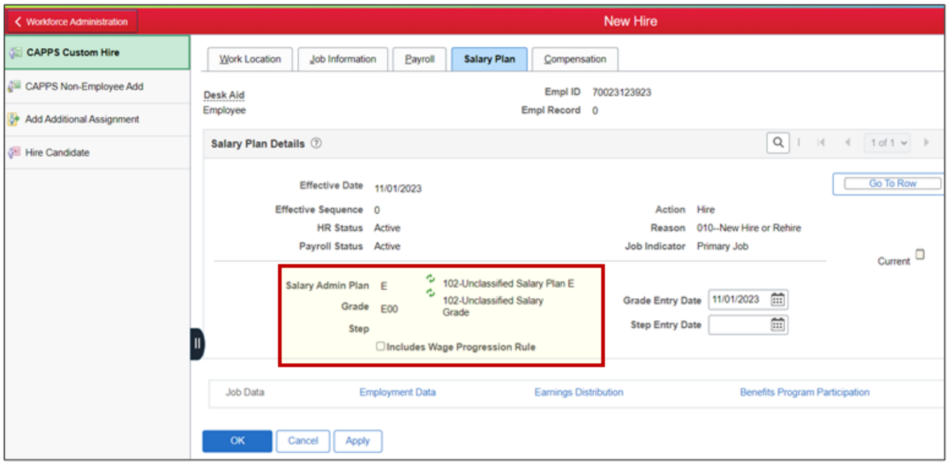
40. Verify the payroll information.



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.

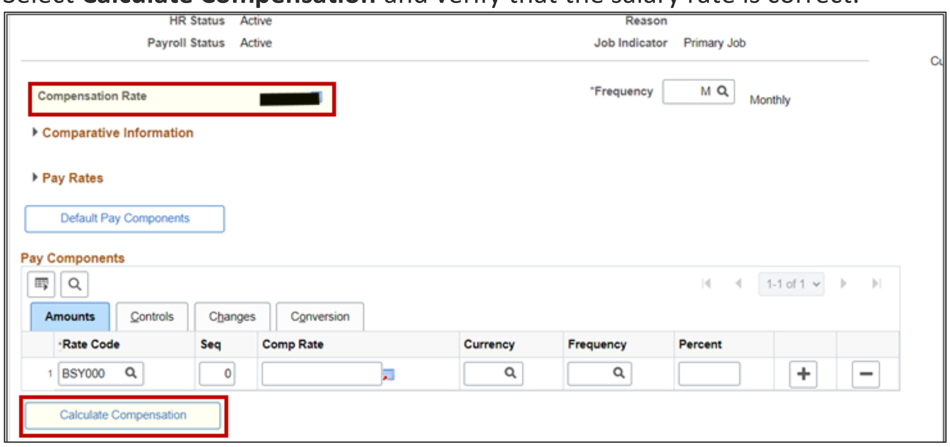
42. Verify the applicable `SALARY ACTION PLAN`, `GRADE`, and `STEP` fields.



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.

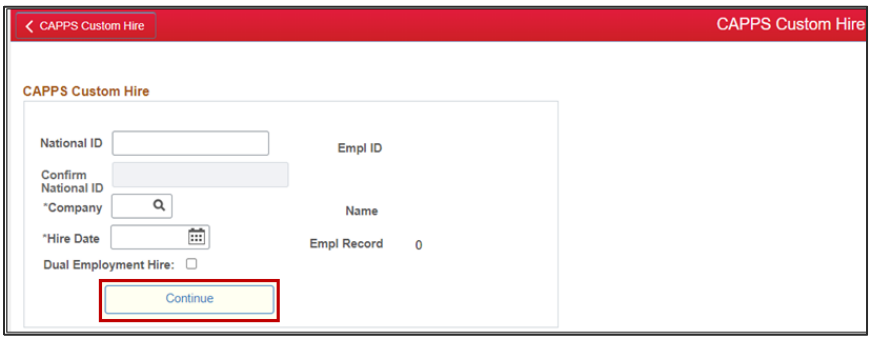
Rehire a Prior Employee — Fluid Hire Process

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**.



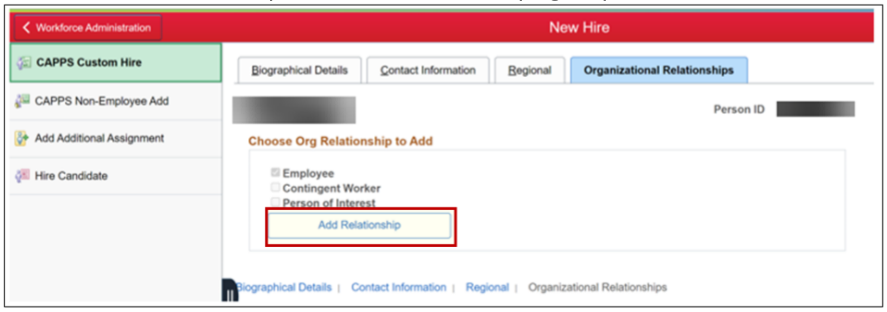
The following message displays:
The EmplID you have entered should already exist. Are you sure you want to use this EmplID?

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.

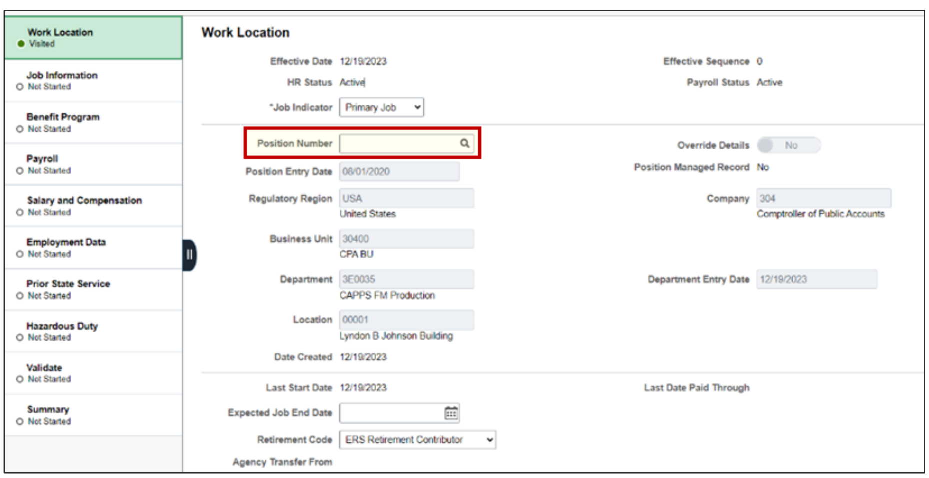
> **Note: DO NOT** enter any type of email address as a part of the CAPPS Custom Hire process. This type of information can be updated **after** completing the new hire process. If your agency is using the email interface, the business email is updated by the interface. Otherwise, enter the business 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.

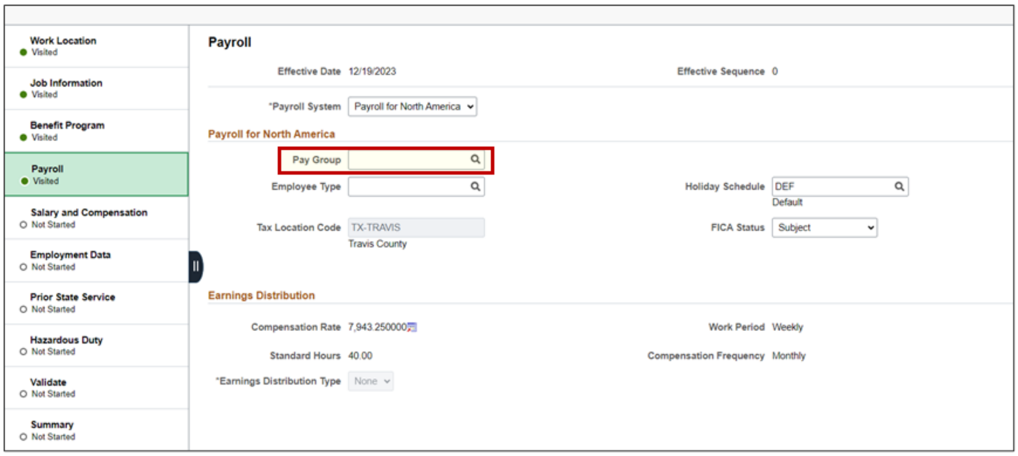
23. Verify the data on the *Benefits Program* page is correct.

> **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.

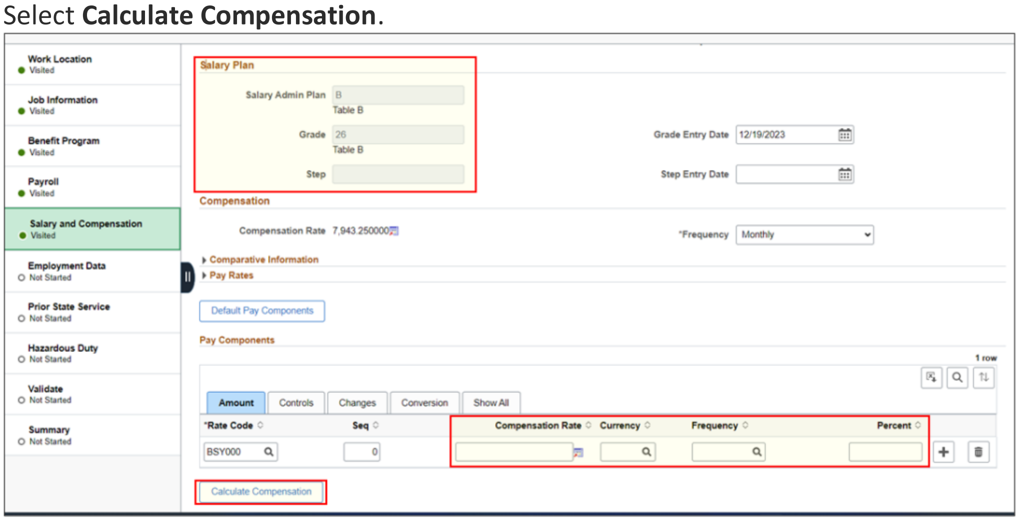
26. Select **Next** in the top right-hand corner to move to the ***Salary and Compensation*** page.

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.

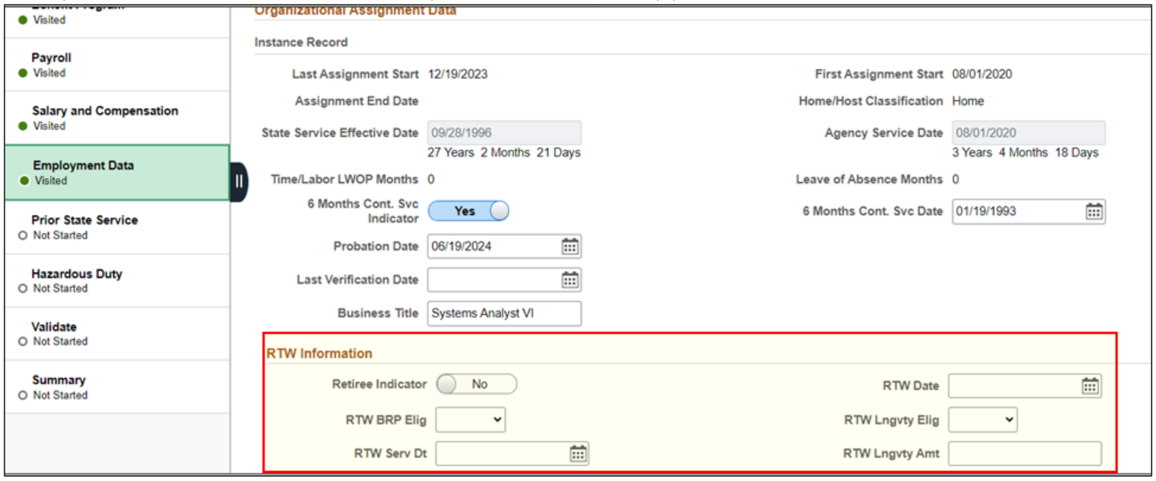
> **Note:** Always use the full monthly salary.

29. Select **Calculate Compensation**.



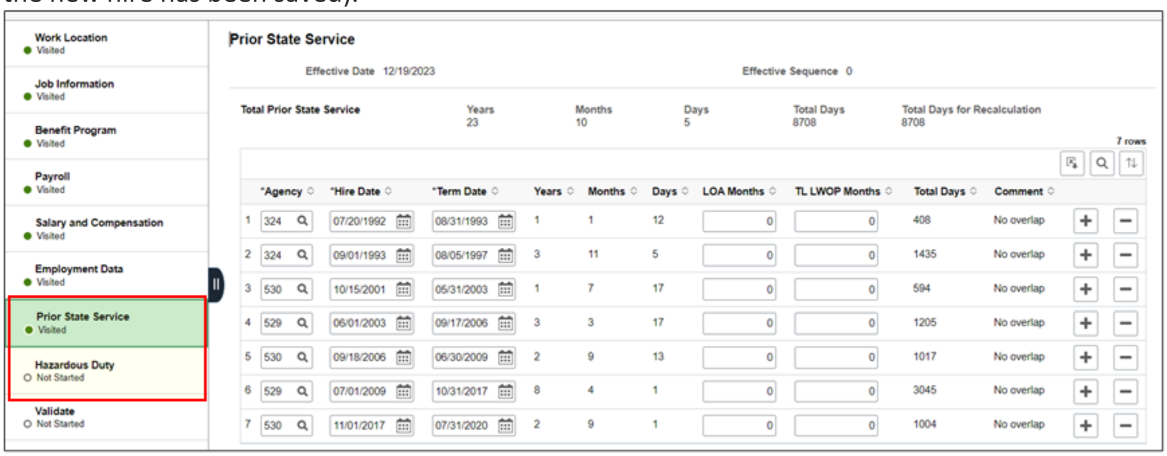
30. Select **Next** in the top right-hand corner, which opens the *Employment Data* page.

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



32. Select **Next** in the top right-hand, which opens the *Prior State Service* page.

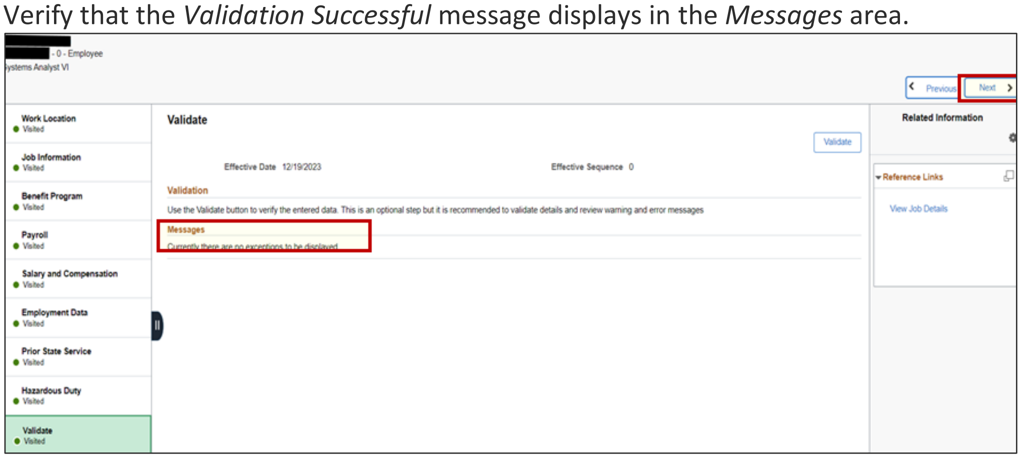
33. Make any necessary updates to the ***Prior State Service*** page and/or the **Hazardous Duty** page (only after the new hire has been saved).



34. Select **Next** in the top right-hand corner, which opens the *Validate* page.

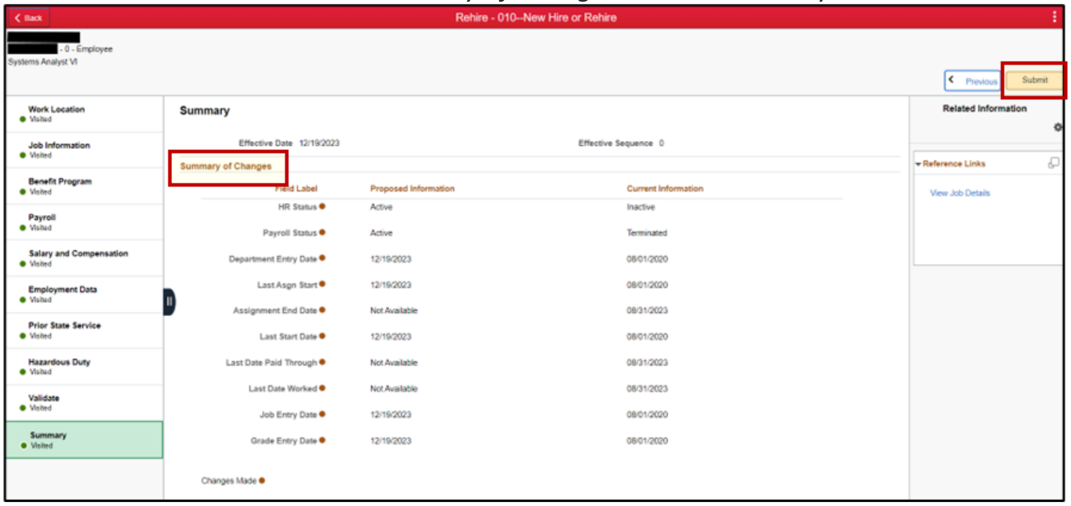
35. Select **Validate** in the right-hand corner.

36. Verify that the *Validation Successful* message displays in the *Messages* area.



37. 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:

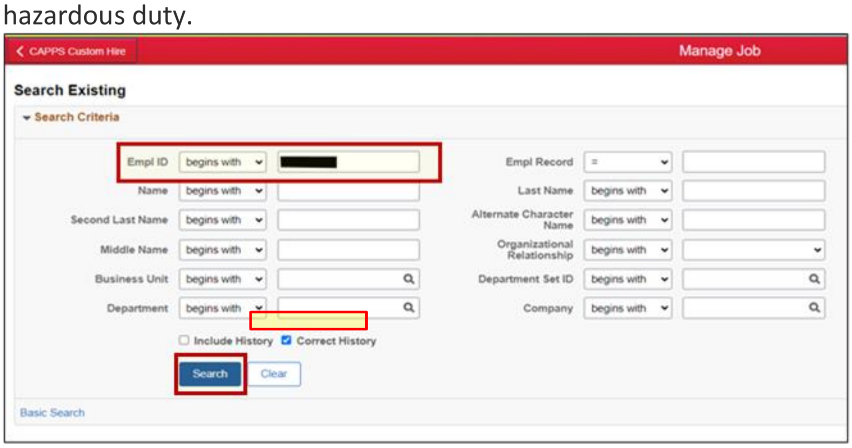
- If you have Correct History access, you can edit the most recent job action to make the appropriate updates.
- If you do not have Correct History access, you will need to add Job Action: DTA-038 to make the appropriate updates.

Navigation

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

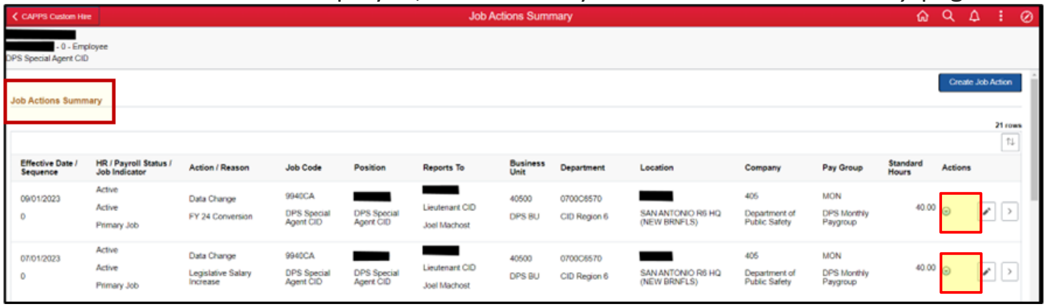
Updating with Correct History Access

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.

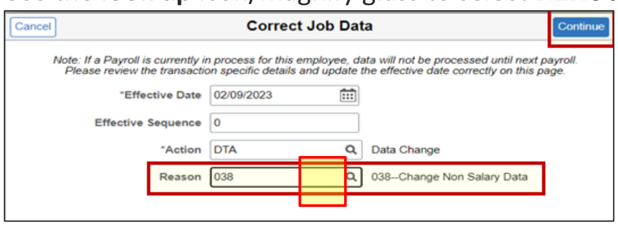


2. Enter the `EMPL ID` field and select **Search**.

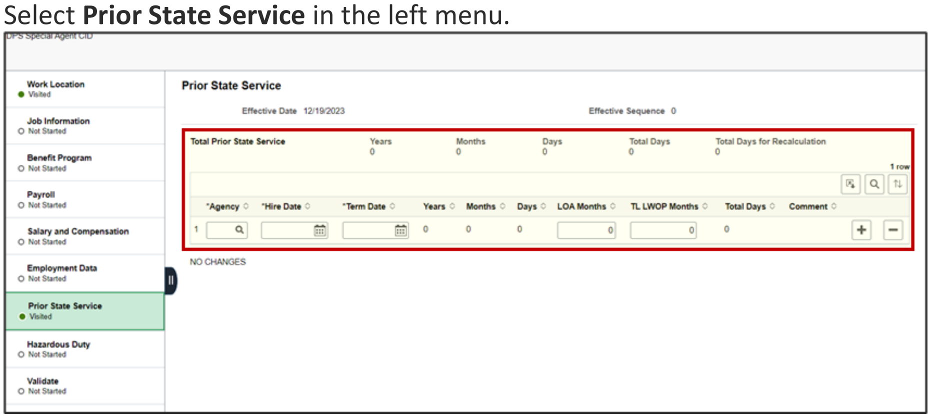
3. Select the correct active employee, which takes you to *Job Actions Summary* page.



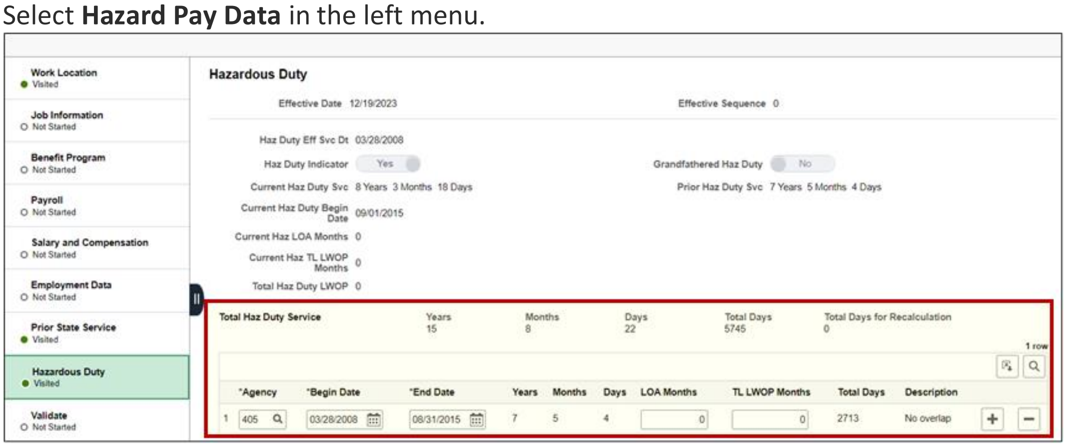
4. Select the pencil icon to the right of the most recent job action row, which opens a pop-up window.
5. Use the **look up** icon/magnify glass to select REASON **038 Change Non Salary Data**.



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

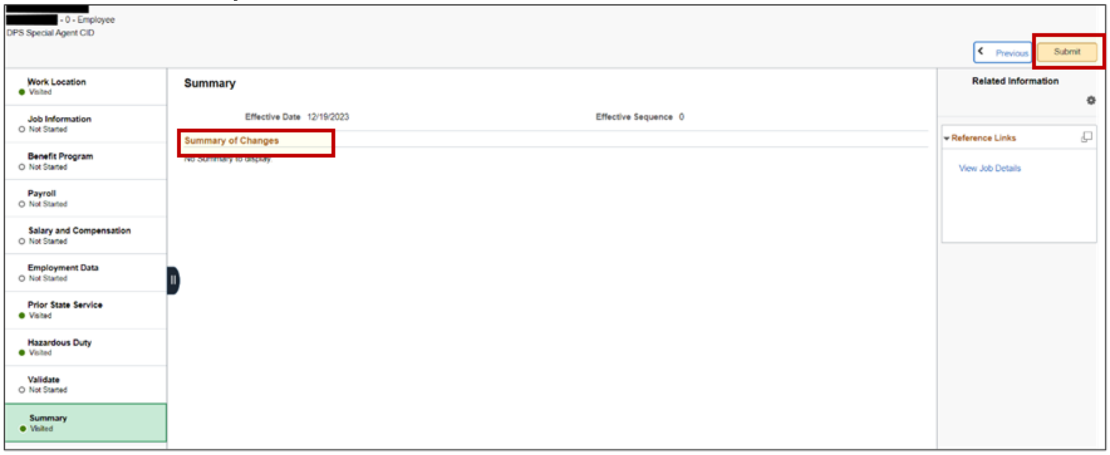


8. Make appropriate changes.
9. Select **Hazard Pay Data** in the left menu.



10. Make appropriate changes.

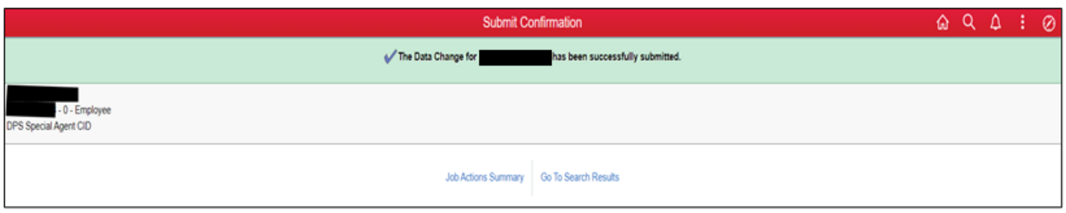
11. Select the **Summary** section in the left menu.



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 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.



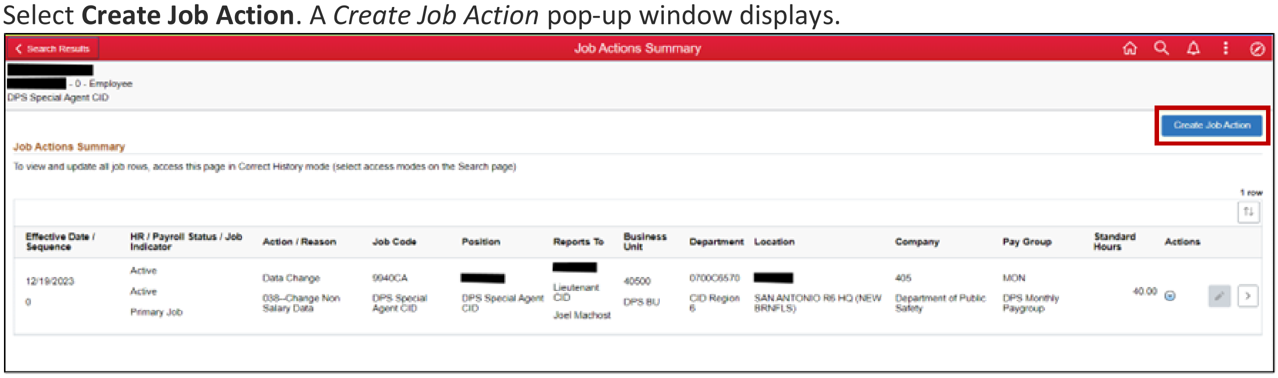
Updating Without Correct History Access

1. Enter the `EMPL ID`.

2. Select **Search**.
   The Job Actions Summary page displays.

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

3. Select **Create Job Action**. A *Create Job Action* pop-up window displays.



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