



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

Requesting and Approving Remote Workers

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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Requesting and Approving Remote Workers

Overview

CAPPS offers remote worker features for managers, administrators and employees that includes employee self-service, approvals and **Remote Worker Insights** visualizations. There are three types of users:

- **Employees** — employee self-service (ESS)
- **Managers** — manager self-service (MSS)
- **Administrators** — remote worker administrator (RWA)

When an agency decides to use the remote worker feature, it has the option using either:

- Remote Worker **Lite**
- Remote Worker **Medium**
- Remote Worker **Full**

Remote Worker Full

With *Remote Worker Full*, the agency RWA is assigned the core role through an *SSA Security Request*. The setup for a remote worker on the agency table updates both the MSS and ESS roles. This setup triggers the addition of the agency's **Remote Worker** tile on both MSS and ESS dashboards. The employee is allowed to enter a request for remote work, which the employee's **Reports To** manager can review/approve/deny. The manager or administrator are still allowed to enter a request on behalf of the employee, which are automatically approved. If the manager is not available, the RWA is able to approve or deny the request on behalf of the manager.

Remote Worker Medium

With *Remote Worker Medium*, in addition to the RWA role (mentioned above), the manager receives the **Remote Worker** tile and is able to request remote work on behalf of their direct and indirect **Reports To** employees. If a manager submits a request on behalf of their direct or indirect **Reports To** employees, the request is automatically approved and appears in the manager's **Remote Worker Insights** visualizations dashboard.

Remote Worker Lite

With *Remote Worker Lite*, the agency RWA is assigned the core role (requested through an *SSA Security Request*) and there is no ESS or MSS access to remote worker features. The RWA receives the **Remote Worker** tile on their dashboard and will enter all requests on behalf of the employees, which are automatically approved. The RWA is the only users that can see the updates in the **Remote Worker Insights** visualizations dashboard.

Remote Worker Security

There are three new roles related to the deployment of the remote worker module:

- TX_SS_EMPLOYEE_RMWK
- TX_SS_MANAGER_RMWK
- TX_HCM_AGENCY_ADMIN_RMWK

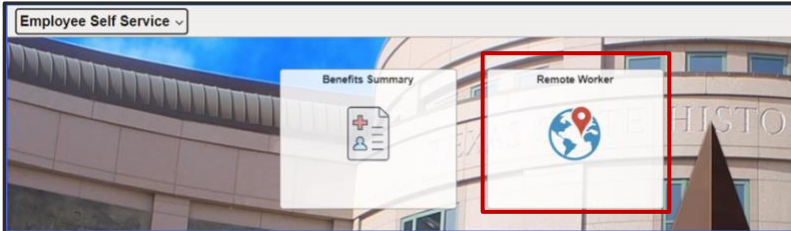
Employee and manager roles are automatically provisioned dependent on the agency table setup (*Full, Medium, or Lite*).

The RWA role requires an *SSA Security Request* and should be assigned to an employee with full agency access.

Employee Self Service: Remote Worker Request

Employees are able to submit their own request to work remotely, which then routes an approval request to the employee's **Reports To** manager or supervisor.

Agencies that use *Remote Worker Full* can see the **Remote Worker** tile on the *Employee Self-Service* dashboard for all employees.

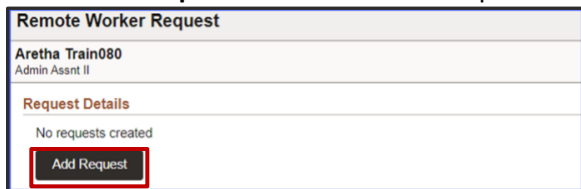


Navigation

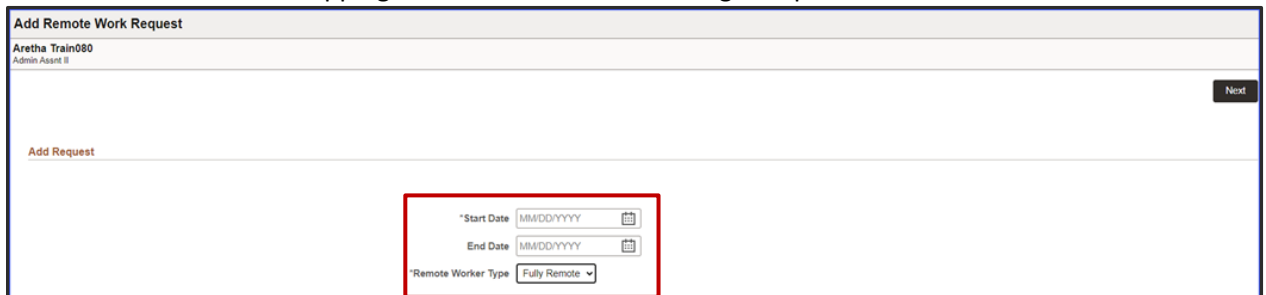
Dashboard: Employee Self Service; **Tile:** Remote Worker

To enter a remote worker request using the **Remote Worker** tile (which opens the **Remote Worker Request** page):

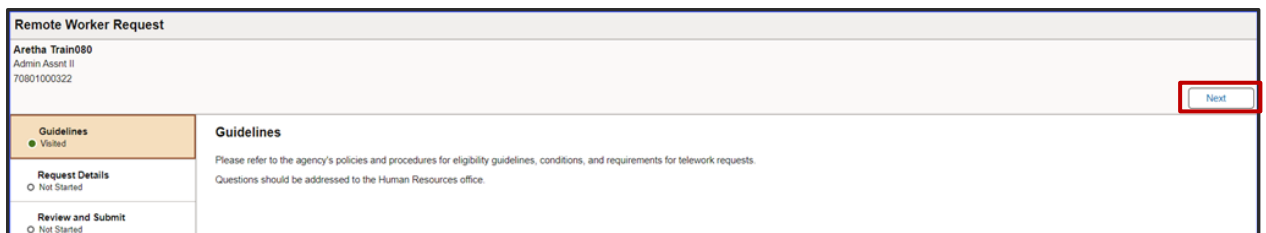
1. Select **Add Request** to initiate a new request.



2. Enter a **START DATE** (entering an **END DATE** is optional).
3. Enter **REMOTE WORKER TYPE** (either **Fully Remote** or **Hybrid**).
There should not be overlapping start dates when submitting a request.



4. Select **Next** on *Add Request* page.
5. Select **Guidelines** in the left menu.
6. Review the information.
7. Select **Next**.



8. Select **Request Details** in the left menu.

9. Select the REMOTE WORKER TYPE (either **Fully Remote** or **Hybrid**).

Selecting **Fully Remote** requires the employee to indicate the location from which they will be working (either **Home** or **Other**).

Selecting **Home** automatically displays the employee’s street address, city, state and zip code.

The screenshot shows the 'Remote Worker Request' form for 'Aretha Train080'. The 'Request Details' section has 'Start Date' 03/01/2024. The 'Remote Worker Type' is set to 'Fully Remote' and 'Remote Location' is 'Home'. Below these, the address is displayed: 'Test Address 13, Austin, TX 78753, 227'. A red box highlights the 'Remote Worker Type' and 'Remote Location' dropdowns.

Selecting **Other** allows the employee to add a different address.

The screenshot shows the 'Remote Worker Request' form with 'Remote Worker Type' set to 'Fully Remote' and 'Remote Location' set to 'Other'. An 'Add Address' button is highlighted with a red box.

Selecting **Hybrid** requires the employee to enter additional information for REMOTE LOCATION (either **Home** or **Other**). The employee is also required to choose either **Average Days for Month**, **Average Days per Week**, or **Specific Days Per Week** from the REMOTE DAYS drop-down menu.

The screenshot shows the 'Remote Worker Request' form with 'Remote Worker Type' set to 'Hybrid' and 'Remote Location' set to 'Home'. The address is 'Test Address 13, Austin, TX 78753, 227'. The 'Remote Days' dropdown menu is open, showing options: 'Average Days Per Month', 'Average Days Per Week', and 'Specific Days Per Week'. A red box highlights the 'Remote Worker Type', 'Remote Location', and 'Remote Days' dropdowns.

Selecting REMOTE DAYS as **Specific Days Per Week** requires the employee to indicate the days of the week the employee will be working remotely.

The screenshot shows the 'Remote Worker Request' form with 'Remote Worker Type' set to 'Hybrid' and 'Remote Location' set to 'Home'. The address is 'Test Address 13, Austin, TX 78753, 227'. The 'Remote Days' dropdown is set to 'Specific Days Per Week'. Below it, a 'Select Days' section shows seven circular buttons for 'Mon', 'Tue', 'Wed', 'Thur', 'Fri', 'Sat', and 'Sun'. A red box highlights the 'Remote Days' dropdown and the 'Select Days' buttons.

10. Select **Next** to save your entries as a *Draft* and route to the **Review and Submit** page.

Important: If the employee leaves this request in *Draft* (prior to submission), the employee can return to finish the request. However, the employee cannot add a new request until this request is submitted/processed.

Remote Worker Request

Aretha Train080
Admin Assnt II

Add Request

Request Details

Start Date	End Date	Remote Worker Type	Remote Location	Status	Requestor	Approval Chain	Delete
03/01/2024		Hybrid	Home	Draft	Aretha Train080	Approval Chain	

1 row

11. Select the arrow icon in the lower right corner of the **Request Details** to edit the request *Draft*.

Remote Worker Request

Aretha Train080
Admin Assnt II

Add Request

Request Details

Start Date	End Date	Remote Worker Type	Remote Location	Status	Requestor	Approval Chain	Delete
03/01/2024		Hybrid	Home	Draft	Aretha Train080	Approval Chain	

1 row

12. **Submit** the request.
A pop-up window displays that asks **Are you sure you want to submit this request?**
13. Select **Yes**.

SUCCESS! The request is now pending approval from the employee’s manager.

Remote Worker Confirmation

Request has been submitted successfully

Aretha Train080
Admin Assnt II

Remote Worker Approval

Remote Worker Approval Pending

Remote Worker Approval

Pending

Luna E Train080
RemoteWorkerByPositionMgmt

Go to Remote Worker Requests

Note: The employee is not able to submit another request until the current pending request is approved, denied or deleted.

Manager Self Service: Remote Worker Request

For agencies that choose to use *Remote Worker Full* or *Medium*, the managers have a **Remote Worker** tile on their **Manager Self Service** (MSS) dashboard.

The difference between **Full** and **Medium**:

- **Full** — employees can submit a *Remote Worker Request*
- **Medium** — only managers or RWA can submit *Remote Worker Requests*

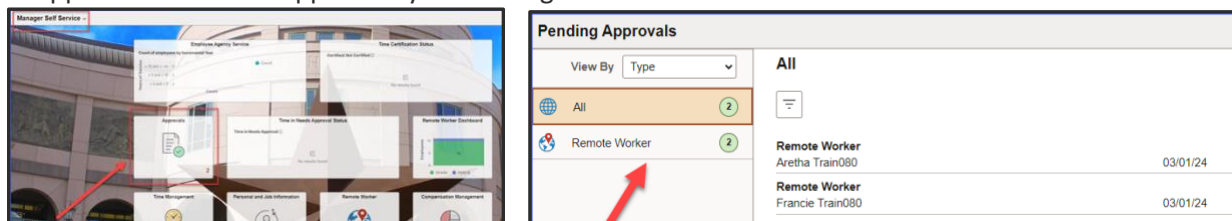
If an agency is on *Remote Worker Full*, the manager can use the **Approvals** tile on the MSS dashboard to find any remote worker requests submitted by the employee.

Note: If a manager submits a remote worker request on behalf of their employee, that request is automatically approved when the manager selects **Submit**.

Navigation

Dashboard: Manager Self Service; **Tile:** Approvals

From the **Approvals** tile on the Manager Self Service screen, the *Pending Approvals* screen displays the number of approvals that need approval by the manager.

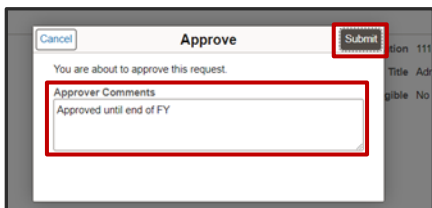


To manage/approve remote work requests:

1. Select the row with the employee's name. The approval page displays.
2. Select either **Approve**, **Deny** or **Pushback** in the top right section of **Remote Worker** approval page.
 - **Approve** — After all those in the approval chain have approved, the status is changed to *Approved* on the **Remote Worker** request page.
 - **Deny** — The request is terminated and the status on the **Remote Worker** request is changed to *Denied* and a new request needs to be created/submitted.
 - **Pushback**: The request is sent back to the submitter and the status is changed to **Pushed Back**. The requestor can make changes to the row and resubmit the request for approval.



3. Select **Approve** to allow the request for remote work.
4. Enter APPROVER COMMENTS in the pop-up window.



5. Select **Submit**, once entry is complete.

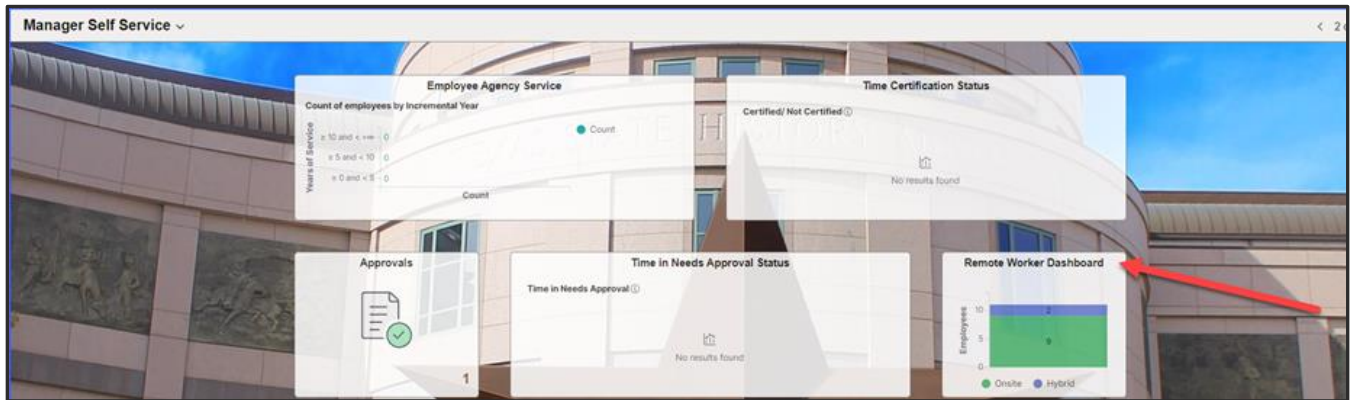
Remote Worker Dashboards

CAPPS **Remote Worker** and **Remote Worker Insights** dashboards provide managers and administrators the ability to view and analyze remote worker data using PeopleSoft’s *Insights* visualizations — an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs, etc., based on queries that retrieve data from the PeopleSoft *Search* framework.

Managers and administrators can access the visualizations through the **Remote Worker** or **Remote Worker Insights** dashboards and monitor the remote workforce or identify worker types by their:

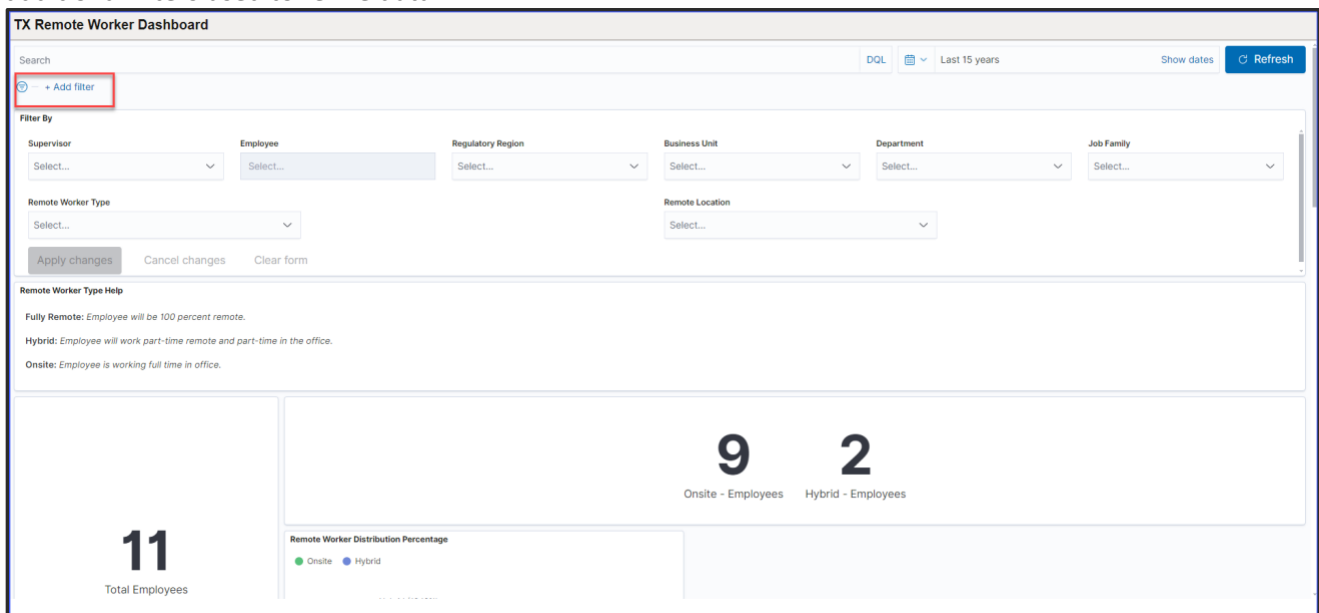
- Location
- Department
- Amount of time working remote

While administrators have access to remote worker information for the entire agency, managers can only view their direct and indirect employee reports.



Important: For optimal performance, only the first 500 rows of data display on the **Remote Worker Insights** dashboard. Use filters to refine the data set you want to visualize.

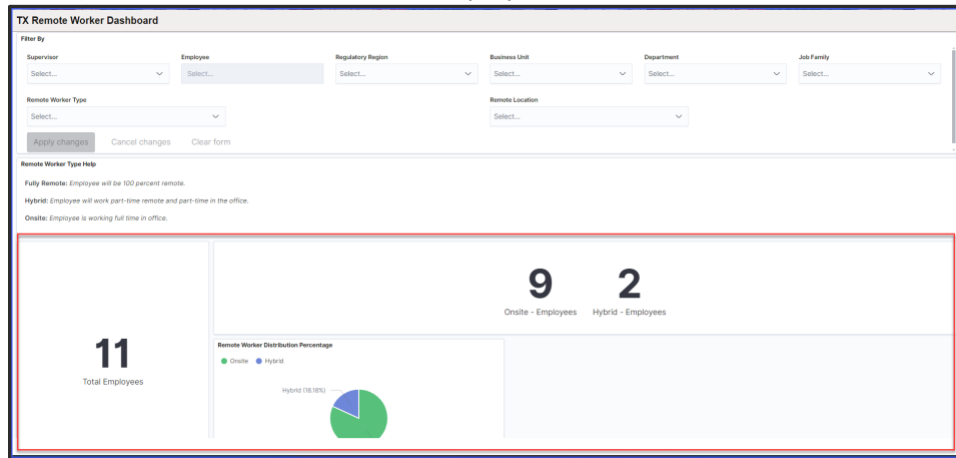
When using the *Insight* reports, managers can use the filters provided –or– select the `ADD FILTER` to display additional filters used to refine data.



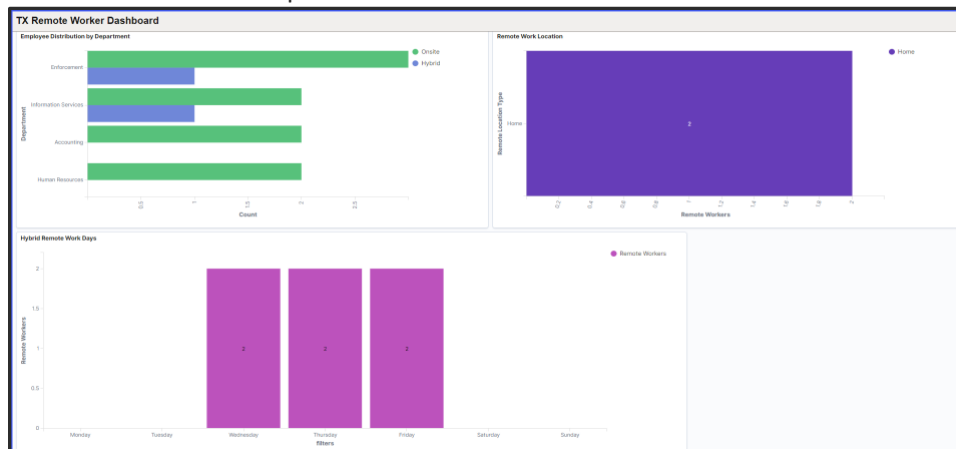
Remote Worker Insights

Visualization	Description
Total Employees (number count)	Displays a count of all employees under the manager’s supervision (direct and indirect reports) that meet the filter criteria.
Remote worker (number counts by type)	Displays the a count of the types of workers under a manager's supervision related to the filter criteria for employees who work: <ul style="list-style-type: none"> • Fully remote • Fully onsite (at the office) • Hybrid (both remote and at the office)
Remote Worker Distribution Percentage (pie chart)	Displays a graphic representation of the manager’s subordinates that are: <ul style="list-style-type: none"> • Fully remote • Fully onsite (at the office) • Hybrid (both remote and at the office)
Remote Work Location (horizontal bar chart)	Displays the work locations of workers that are fully or hybrid remote.
Employee Distribution by Department (horizontal bar chart)	Displays employees under the manager's supervision by department and remote work type.
Hybrid Remote Work Days (vertical bar chart)	Displays the days hybrid remote employees are anticipated to work remotely.
Remote Work Reason (pie chart)	Displays the top five reasons employees are working remotely.

The **Remote Worker Dashboard** provides visualizations for the manager for each type of worker (described above) as well as a total number of employees.

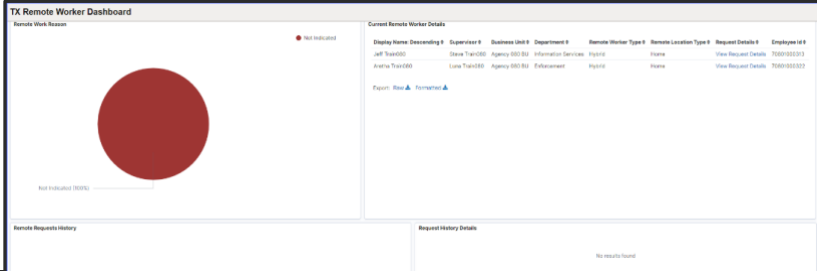


Current **Remote Worker Dashboard** displays a detailed grid of employees under the manger’s supervision that meet the visualization specifications.



Historical Remote Worker Visualization

Visualization	Description
Remote Requests History graph	Displays remote worker trends by month comparing fully remote and hybrid remote workers.
Request History Details table grids	Displays remote worker information by month. For a list of elements and controls in the details grid, see the <i>Current Remote Worker Details Grid</i> subtopic that precedes this subtopic.



Remote Worker Administrator

Access as a RWA must be requested by the agency security administrator for the user to see the **Remote Worker** tile on the **Workforce Administration** dashboard.

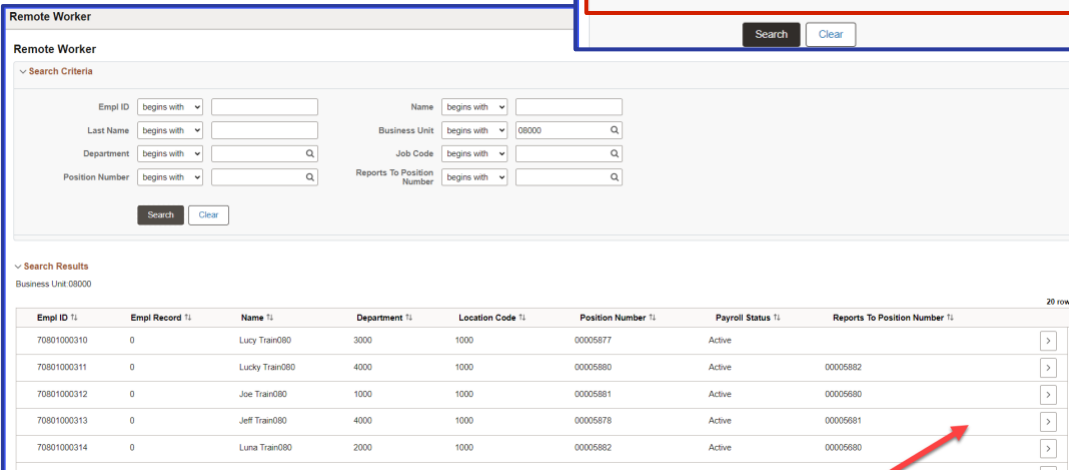
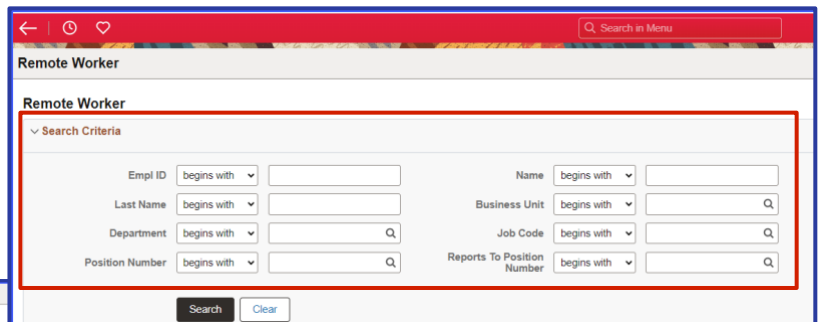
Administrators and managers can also use the approvals framework to approve employee requests.

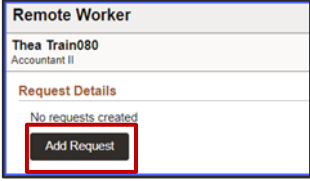
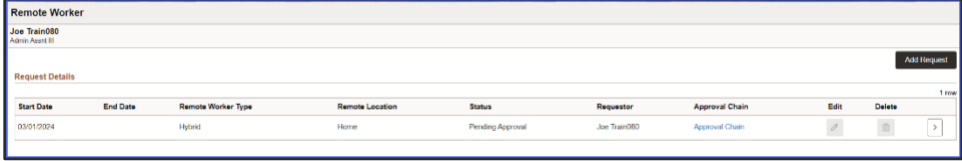



Fluid RWAs use the configurable search functionality. This allows the user to search for an employee using other means, such as business unit, department, position number, or job code.

Administrators use the **Remote Worker** tile from the **Workforce Administration** home page to enter and review remote worker requests for the workforce with fluid pages. If the RWA enters a request on behalf of the employee, it is automatically approved when submitted.

Use **Remote Worker's Search Criteria** section in to add your search configuration.

Select the arrow at the end of the appropriate row for that employee to open the request page and access more details for that employee.



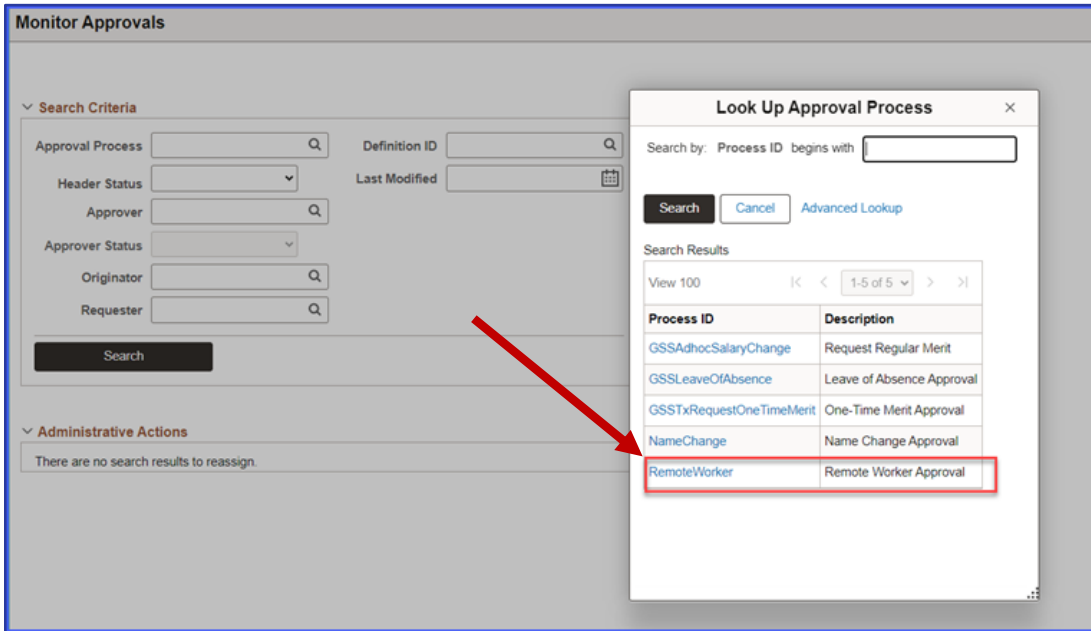
Field or Control	Description
<p>ADD REQUEST</p>	<p>Select Add Request to enter a new remote worker request.</p> <div data-bbox="456 296 1135 390" style="border: 1px solid gray; padding: 5px;"> <p>Note: If an in-progress row exists (<i>Draft</i> or <i>Pending Approval</i>), you cannot add a new row. However, you can correct another row.</p> </div> <p>Best practice is to add a new transaction row and complete the approval process for that request before adding another row.</p> <div data-bbox="456 489 1412 648" style="border: 1px solid gray; padding: 5px;">   </div>
<p>START DATE AND END DATE</p>	<p>For existing requests, the start date displays. The end date is not required and the field may display as blank.</p> <p>When adding a new request that overlaps with the end date of the existing request, or the existing request does not have an end date, the system will insert an end date as the day before the start date of the new request. You do not need to access the existing request to change or add the end date in this scenario.</p>
<p>STATUS</p>	<p>Displays the status of the remote worker row.</p> <div data-bbox="456 940 1451 976" style="border: 1px solid gray; padding: 5px;"> <p>Note: You can only have one in progress row at a time.</p> </div>
<p>APPROVAL CHAIN</p>	<p>Select Approval Chain to view the approval status and approver details of a proposed request. This is only available when the approval workflow is set up and the request was sent for approval.</p>
<p>EDIT</p> 	<p>An administrator and manager can select the Edit (pencil icon) to make corrections to the remote worker request.</p> <p>When making an edit, the system opens the Add Remote Work Request (or <i>Edit Request</i>) page, which enables the administrator or manager to update the START DATE, END DATE, or REMOTE WORKER TYPE for the existing row. Select Next to move to the <i>Remote Worker Activity Guide</i> pages.</p> <div data-bbox="456 1329 1451 1392" style="border: 1px solid gray; padding: 5px;"> <p>Note: Administrators and managers can edit current and future requests, but edits are not allowed on past-dated requests.</p> </div>
<p>DELETE</p> 	<p>Select Delete (trash can icon) to remove the remote worker row. This is only available for the specified roles when a request has the following status:</p> <ul style="list-style-type: none"> • Draft: Delete is available for the person who originated the request and the administrator. • Pending Approval: Delete is not available for any of the roles. However, those in the approval chain can access the approval request and approve, deny or push back the request. • Approved: Delete is available for the manager and the administrator.
<p>EDIT/VIEW</p> 	<p>If the request is approved, select Edit/View (right arrow icon) to open the <i>Request Details</i> page and view the remote work details.</p> <div data-bbox="456 1780 1451 1843" style="border: 1px solid gray; padding: 5px;"> <p>Note: Administrators and managers can edit current and future requests, but edits are not allowed on past-dated requests.</p> </div> <p>If you are the requestor and the row is in <i>Draft</i> status, select to access the Remote Worker Request Activity Guide pages and make updates.</p>

RWA Requesting Approvals on Behalf of Manager

Navigation

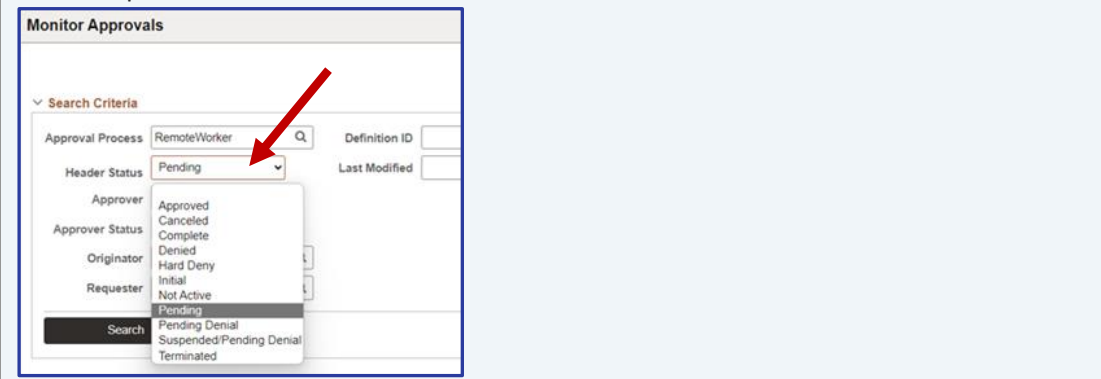
NavBar: Workforce Administration, Self Service Transactions, Approvals & Delegations, Monitor Approvals

1. Select **Look Up Approval Process** in the *Monitor Approvals* page.
2. Select REMOTE WORKER.



3. Select **Search**.

Note: All Remote Worker transactions display.
Select a specific **HEADER STATUS** of the transaction to narrow the search further.



4. Select the the employee you want to approve.
This opens the **Monitor Approvals** page.

5. Select the APPROVER.

Monitor Approvals

Monitor Approvals

Approval Process	RemoteWorker	Definition ID	byManager
Empl ID	70801000328	Empl Record	0
Start Date for Gen Standing PO	2024-03-01		

Approver:

Comment:

Administrative Approve/Deny

Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.

Approve Deny Pushback Restart

Remote Worker Approval

6. Select **Approve** or **Deny**.

If the request is denied, a COMMENT is required.

Monitor Approvals

Monitor Approvals

Approval Process	RemoteWorker	Definition ID	byManager
Empl ID	70801000328	Empl Record	0
Start Date for Gen Standing PO	2024-03-01		

Comment:

Administrative Approve/Deny

Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.

Approve Deny Pushback Resubmit

Remote Worker Approval

Remote Worker Approval: **Denied**

Return

The **Remote Worker Approval** displays the status of **Denied**.

If the request is approved, the **Remote Worker Approval** displays the status of **Approved**.

Monitor Approvals

Monitor Approvals

Approval Process	RemoteWorker	Definition ID	byManager
Empl ID	70801000312	Empl Record	0
Start Date for Gen Standing PO	2024-03-01		

Comment:

Administrative Approve/Deny

Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.

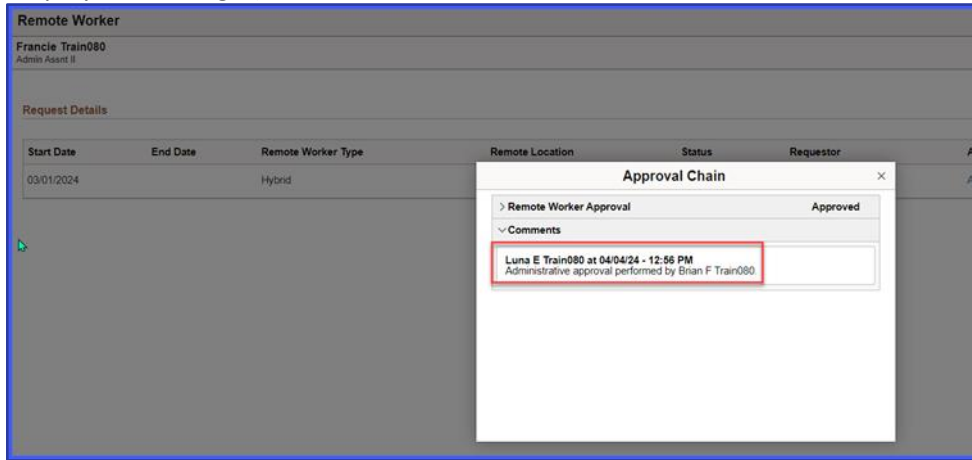
Approve Deny Pushback Resubmit

Remote Worker Approval

Remote Worker Approval: **Approved**

Return

When an administrator approves a request and goes back to review the transaction on the **Remote Worker** tile, the name of the person that performed the approval displays (in lieu of name of the employee's manager).



Results from the approvals are reflected in the **Remote Worker Insights** visualizations for the manager and the RWA. The manager and the RWA have the same visualization, with the exception of **who** they see:

- The RWA can see the entire agency's workforce.
- The manager can only see their **direct Reports To** employees.

For more detailed information, see [Remote Worker Insights](#) in the **Remote Worker Dashboards** section of this document.

Revision History

Date	Description of Change	Changed By
Oct. 10, 2024	Initial release.	J McMillan