**CAPPS HR/Payroll**

**FY22 Image and Tools Upgrade**

**Employee Self Service (ESS)**

**June 2022**

# Employee Self-Service Outline

Section 1 - ESS Timesheet *(Time Reporting)*

Section 2 - ESS My Pay *(Paycheck/Deductions/Taxes)*

# Section 1
## ESS Timesheet

# Key Terms and Definitions

- **Timesheet-** Used to track hours worked and leave time taken for agency employees.
- **Time Reporting Codes (TRC)-** Used to identify the type of hours being entered on the timesheet. All time on the timesheet is associated with a TRC. Each different type of time has its own unique TRC. For example: Regular Hours Worked is "REGHR" and Annual Leave is "ANLVT".
- **Time Exceptions-** Errors produced by the Time Administration process.
- **Reported Time-** Hours that an employee enters on their timesheet.
- **Payable Time-** The result of reported time that an employee has entered on their timesheet and has been approved by their manager. It also includes regular scheduled hours that do not need to be entered on the timesheet.
- **FMLA ID-** This field is used to track FMLA hours. The FMLA ID number is assigned by your Human Resources Representative and manually entered.

# Key Terms and Definitions Continued

- **Time and Labor-** An integrated solution in CAPPS that involves all the processes related to time worked or leave time taken for employees. It supports the time reporting needs of a wide range of business functions such as payroll, CAPPS Financials, projects, and labor allocation cost. Information entered in Time and Labor is processed through payroll.

- **Override Reason Code (ORC)-** Used for tracking purposes to identify periods of time that are worked for a specific reason such as recording time worked during a disaster.

- **Labor Account Code (LAC)-** The LAC is used to track hours for a specific purpose. A project is an example that may have a LAC assigned. This information does not integrate with Financials/Commitment Accounting. This field is used for reporting purposes.

# Key Terms and Definitions Continued

- **Positive Time Reporter-** Positive Time Reporters are hourly paid employees. An assigned schedule does not appear on their Timesheet. Positive Time Reporters need to enter all hours physically worked or leave taken on their Timesheet in order to get paid.

- **Exception Time Reporter-** Exception Time Reporters are Exception Hourly (salaried) employees. Their Timesheet reflects an assigned schedule with the applicable daily hours. Exception Time Reporters enter time on the timesheet only when it deviates from their assigned scheduled hours, or when an ORC or LAC is applicable. This includes hours worked over their regular scheduled hours and any leave time taken during their scheduled hours.

# Key Roles and Responsibilities

- **Employee-** This role is responsible for making sure that all the hours reflected on their timesheet are accurate. This includes physical hours worked and leave time taken for Positive Time Reporters and Exception Time Reporters.

- **Manager-** Responsible for monitoring, reviewing, and approving time worked or leave time taken entered on the employee Timesheet. Managers can also enter time on behalf of an employee.

- **Time Administrator-** Performs the duties of the manager on behalf of the manager.

- **Agency Super User-** Provides oversight to the other roles and can monitor, review, approve and enter time on behalf of an employee. This role also has the authority to correct exceptions that occur from Time Admin processing and can run reports and queries at an agency level.

# Timesheet Workflow



**Timesheet Workflow:** Employee's enter their time, *when applicable*

Legend:
- System Generated
- Agency Personnel

- Scheduled Hours (Automatic)
- Exception Time (Employee)
- Positive Time (Employee)
- Submit
- Manager — Approve, Correct, or Delete Row
- Notification is sent to the employee
- Approve
- Correct
- Delete Row
- Time Admin. Runs
- No Exception
- Payable Time → Payroll
- Exception
- Agency Super User (Corrects)
- Re-enter correct information on Timesheet
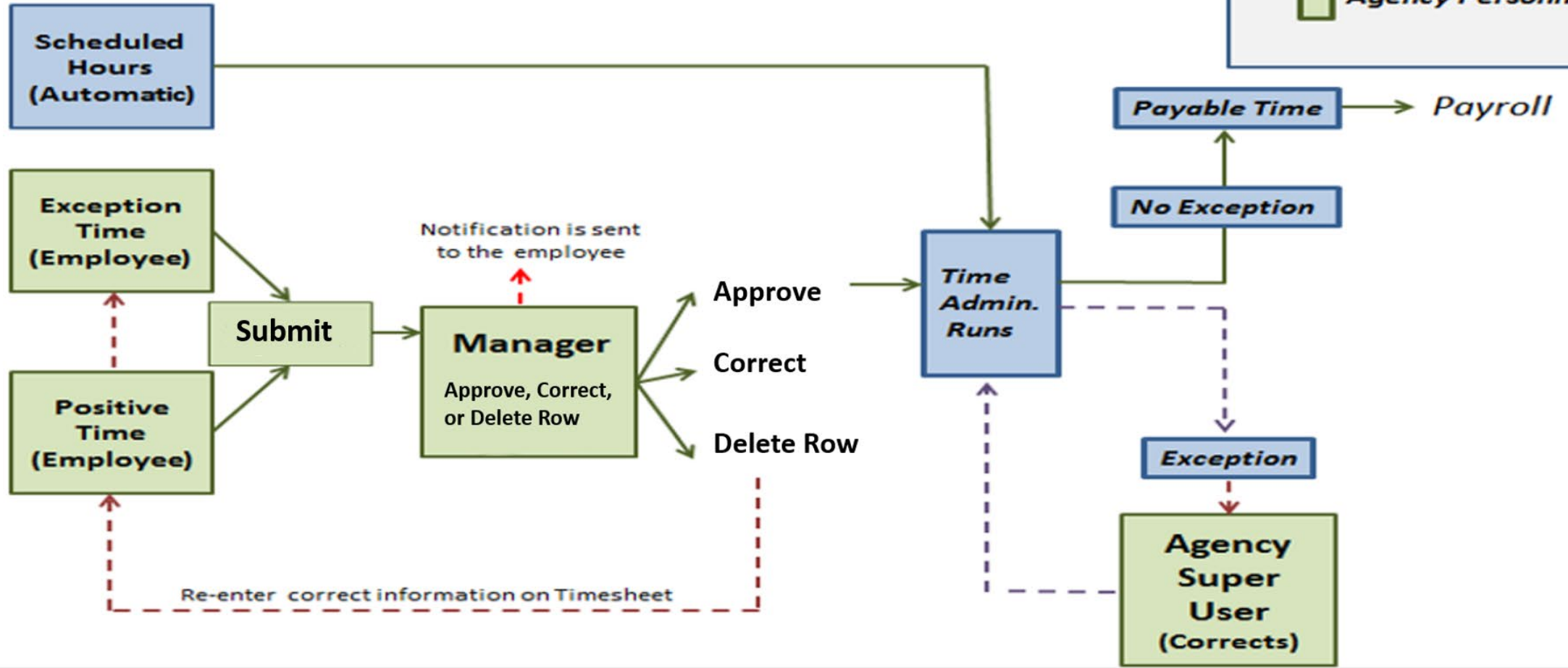
# Timesheet Workflow Details

## Time Reporting Process

**Employee** *(Reported Time)*

> _Exception Time Reporter_ – Enters only hours that deviate from their regular scheduled hours
>
> _Positive Time Reporter_ – Enters all hours physically worked and leave taken

*Time entered by the employee or defaulted from an employee's schedule is known as **Reported Time**.*

**Manager**                                             **Approve**     *- or -*     **Delete**

Managers approve Reported Time. Once approved, a process is run that converts the 'Reported Time' to 'Payable Time'. Payable Time is then picked up by the next payroll cycle.

Scheduled hours for Exception Time Reporters do not require the approval of the manager. Only time entered as an exception/deviation from the employee's schedule requires manager approval.

Prior to deleting time entered on the Timesheet, managers and employees have the option to correct the Timesheet.

If a manager makes a change or deletes the time entries, the employee will receive an email notification. Once it has been "deleted" it must be re-entered if it was originally entered incorrectly.

# Timesheet Workflow Details Continued

When the Time Administration Process runs, it produces one or two outcomes:

1. It converts Reported Time to Payable Time, making it ready for payroll, or

2. If there is an error on the Timesheet, it will create an Exception on the Timesheet.

## Payable Time

Payable Time is picked up in the next Payroll Cycle for the employee to be compensated.

## Exceptions

Exceptions are "errors" on the Timesheet. All exceptions need to be cleared for the employee to receive compensation for the hours in question.

Agency Super Users work with managers to correct exceptions. If a correction is made on an employee's Timesheet the employee will receive an email notification.

When there is an exception on the employee's Timesheet, there is a red triangle symbol in the information box at the top of each time entry day. Also shown on the Time Summary Page

**It is important to note:** When a Timesheet has an exception the employee will be locked out of the Timesheet until the exception has been cleared by the Agency Super User.

# Time Reporting Categories

Time MUST be entered on the timesheet according to the correct Time Reporting Category.

There are two types of Time Reporting Categories:

- **Exception Time Reporters** are also known as **salaried** employees.

  o In CAPPS, these employees are paid according to a predefined work schedule assigned to them in the system.

  o Only need to enter hours worked over regular scheduled hours or leave taken.

- **Positive Time Reporters** are also known as **hourly** employees.

  o In CAPPS, these employees are compensated according to actual hours worked.

  o Must enter **all** time worked and leave time taken on their timesheet.

# Time Reporting Categories Continued

This timesheet has an assigned schedule with hours. This means that this is an **Exception Time Reporter.** They only enter time when different than the schedule, i.e., using leave and/or working additional hours.



This timesheet doesn't have any scheduled hours. This means that this is a **Positive Time Reporter.** They must enter time worked or leave time taken in order to get paid.



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# Time Reporting Codes (TRCs)

**Time Reporting Codes** are used on the timesheet to determine what type of time is being entered.

# Time Reporting Code List

A list of statewide TRCs is displayed on the right. The most common TRCs are underlined.

Additional TRCs may be available at your agency.

| TRCs | Description |
|------|-------------|
| 12CPT | 12 NonExe Disaster Taken |
| 18CPT | 18 Exempt Disaster Taken |
| **ADMLT** | Administrative Leave Taken |
| ADOGT | Assistance Dog Training |
| **ANLVT** | Annual Leave Taken |
| CASAT | Court Appoint Spec Advoc Taken |
| **COMPT** | Compensatory Time Taken |
| DNRBL | Blood Donor |
| DNRBM | Bone Marrow Donor |
| DNROG | Organ Donor |
| EDACT | Educational Activities |
| EDULV | Education Leave |
| EMGNY | Emergency Leave |
| EMTTR | Volunteer EMT Training |
| ESCKT | Extended Sick Leave Taken |
| EXERT | Exercise Leave Taken |
| **FLEXS** | Flexing Schedule |
| FLSAP | Banked Overtime Paid |
| FLSAT | Banked Overtime Taken |
| FPRNT | Foster Parent Leave |
| FTNST | Emergency Fitness Leave Taken |
| HCMPT | Holiday Comp Taken |
| JURYD | Jury Duty |

| TRCs | Description |
|------|-------------|
| LWPDS | Leave Without Pay - Discipline |
| LWPEO | Leave Without Pay - Employee |
| LWPES | Leave Without Pay - Empl Sick |
| LWPFS | Leave Without Pay - Family Sck |
| LWPMY | Leave Without Pay - Military |
| LWPPR | Leave Without Pay - Parental |
| LWPWC | Leave Without Pay - Wrkrs Comp |
| MLTYT | Military Leave Taken |
| NGADT | National Guard Active Duty Tak |
| OHCPT | Optional Holiday Comp Taken |
| ONCLL | On-Call Duty |
| RDCRS | Red Cross Disaster Service |
| REGDS | Reg Hrs Wrkd - Disaster Servcs |
| **REGHR** | Regular Hours Worked |
| **REGHW** | Reg Hrs Worked on Holiday |
| REGOH | RegHol Work in lieu of Opt Hol |
| RLELV | Rsrv Law Enfrcmnt Off Training |
| SCKPT | Sick Leave Pool Taken |
| **SICKT** | Sick Leave Taken |
| SPECT | Special Leave Taken |
| VFFTR | Volunteer Firefighter Training |
| VOTES | Leave to Vote |
| WELLT | Wellness Leave Taken |

# Labor Account Codes (LACs)

*Labor Account Codes* are used to track hours for a specific purpose. A project is an example that may have an LAC assigned.

- It isn't necessary to work an entire day on one specific LAC. Time can be allocated across LACs and across days.

- LACs are agency specific. Employees should consult with their management before entering specific LACs.

# Employee Self Service- My Time and Leave Tile Navigation

- When first logging in to CAPPS, the Employee Self Service Dashboard is the first page to display.

- There are a variety of tiles available depending on user access.

- First, click on the 'My Time and Leave' tile.
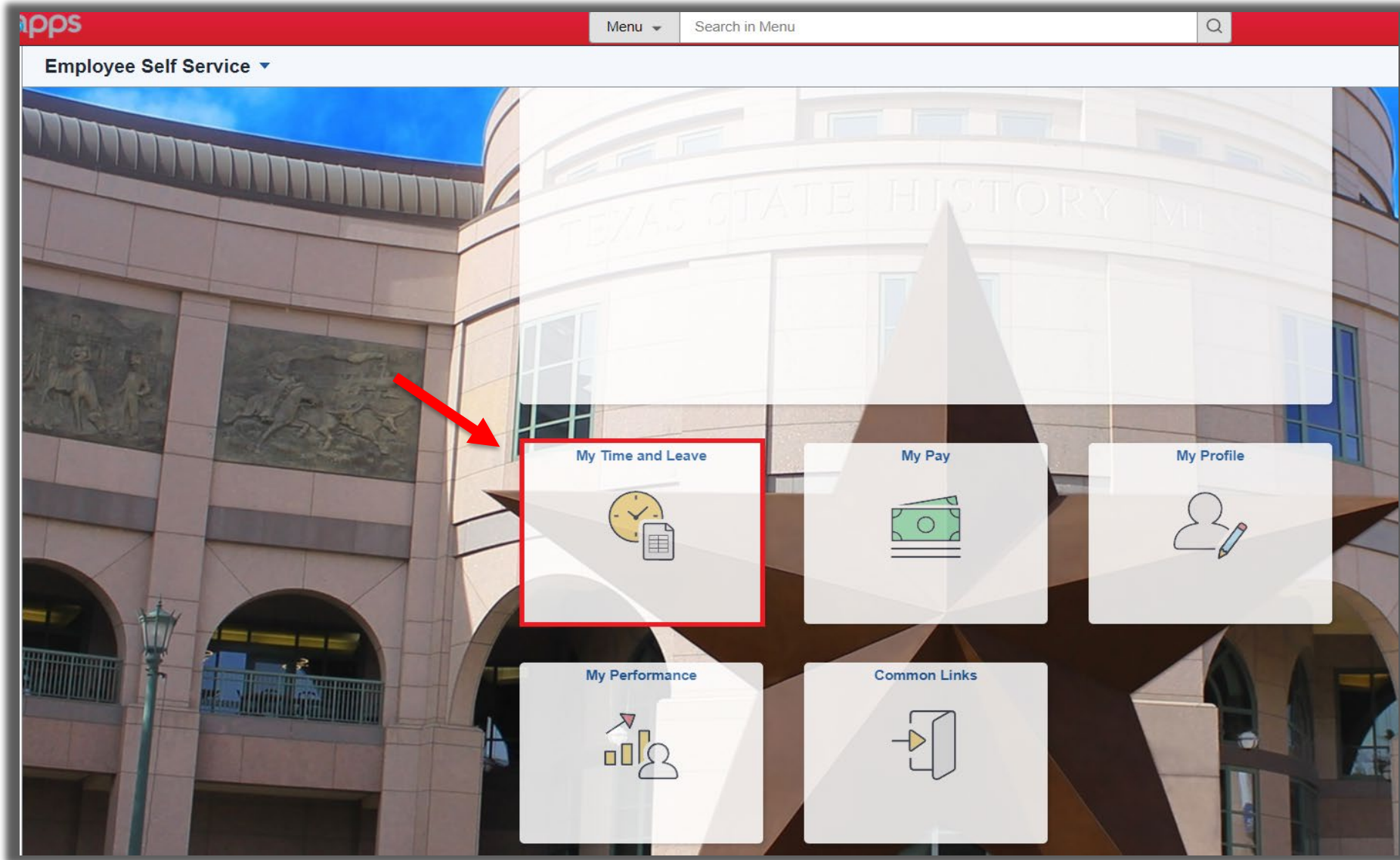
# Employee Self Service- My Time and Leave Menu
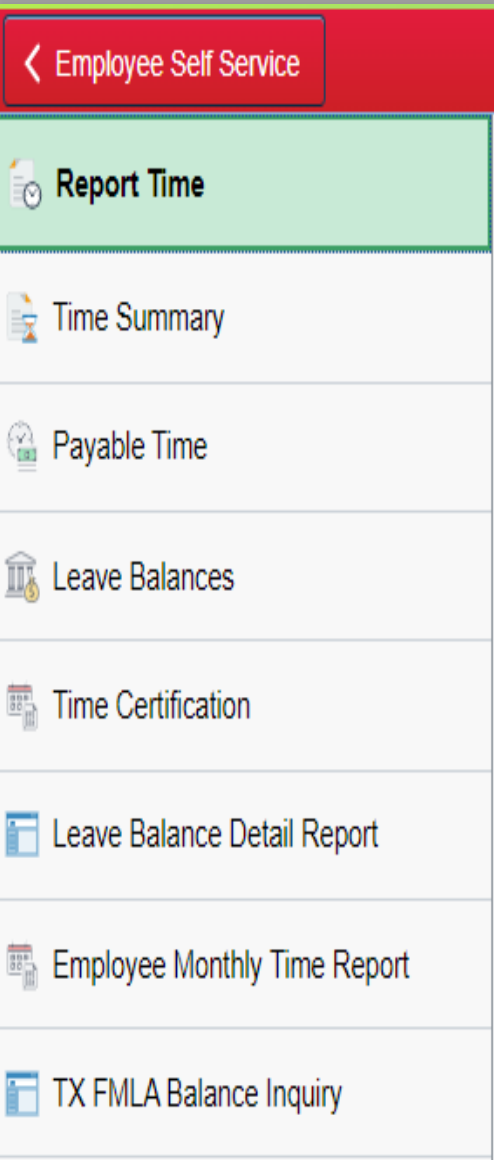


- **Report Time**- This is where Positive and Exception Time Reporters will enter time.

- **Time Summary**- Displays a monthly overview of time entries.

- **Payable Time**- This is approved time that has gone through the Time Administration process.

- **Leave Balances**- This is where users can see their available leave balances.

- **Time Certification**- This is where users can certify time entered.

- **Leave Balance Detail Report**- Run this report to view leave balances within a specific timeframe.

- **Employee Monthly Time Report**- Run this report to view hours on a monthly basis.

- **TX FMLA Balance Inquiry**- View available FMLA Balance.

# Reviewing Timesheet Components

- The top portion of the timesheet displays employee position information such as Empl ID and job title.

- The Leave Balance Summary section provides an overview of total leave hours.

- The timesheet defaults to the employees FLSA work week.

**Name:** Francie Train087
**Empl ID:** 70871000527 0
**Job Title:** Admin Assnt II

**Company/Paygroup:** 087 / MON

**Department:** 1000

**State Service Effective Date:** 09/01/2019

**Manager:** Luna Train087

**Leave Balance Summary**

| Leave Balances | Annual Leave | Sick Leave | FLSA Overtime | Regular Comptime | Holiday Comptime | Optional Holiday | Sick Leave Pool | Extended Sick Leave | Administrative Leave | Fitness Leave | Wellness Leave | Special Leave | Military Leave | Disaster Comp Exp in 12 Months | Disaster Comp Exp in 18 Months | Employee Donated Sick Leave | Family Leave Pool |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Current | 696.00 | 654.00 | 63.75 | 7.00 | 12.00 | 0.00 | 0.00 | 0.00 | 32.00 | 0.00 | 0.00 | 0.00 | 160.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Pending Approval | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Available | 696.00 | 654.00 | 63.75 | 7.00 | 12.00 | 0.00 | 0.00 | 0.00 | 32.00 | 0.00 | 0.00 | 0.00 | 160.00 | 0.00 | 0.00 | 0.00 | 0.00 |

◄  **27 March - 2 April 2022**  ►

**Weekly**

Scheduled  40.00  |  Reported  0 Hours

View Legend

Submit

| *Time Reporting Code | 27-Sunday | 28-Monday | 29-Tuesday | 30-Wednesday | 31-Thursday | 1-Friday | 2-Saturday | Status |
|---|---|---|---|---|---|---|---|---|
| | Scheduled OFF Reported 0 | Scheduled 8 Reported 0 | Scheduled 8 Reported 0 | Scheduled 8 Reported 0 | Scheduled 8 Reported 0 | Scheduled 8 Reported 0 | Scheduled OFF Reported 0 | |
| | | | | | | | | NA |

View Leave Balances

- Certain timesheet actions, such as submitting time for approval, will cause a small symbol to appear in the bottom right corner of the schedule area of the timesheet.

- To see what the symbol represents, click on 'View Legend.' A pop-up window will open which includes all symbols and their meanings.
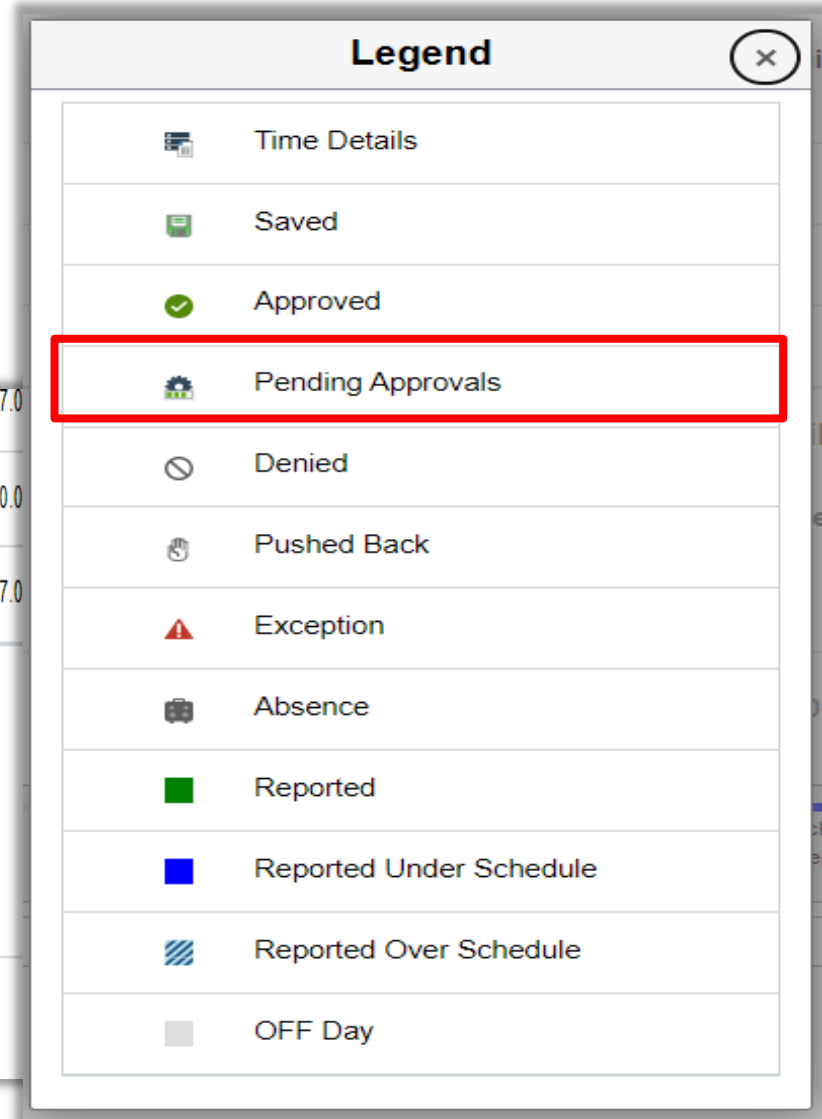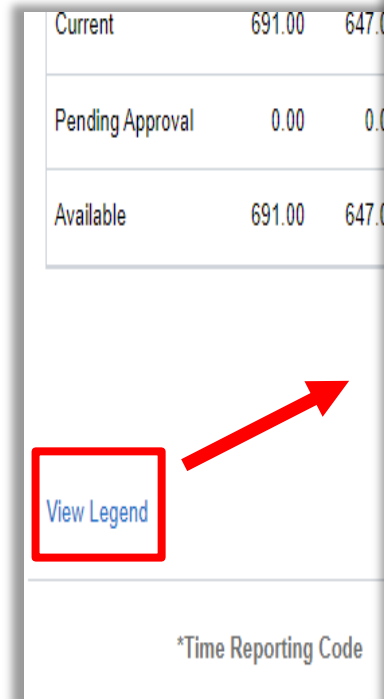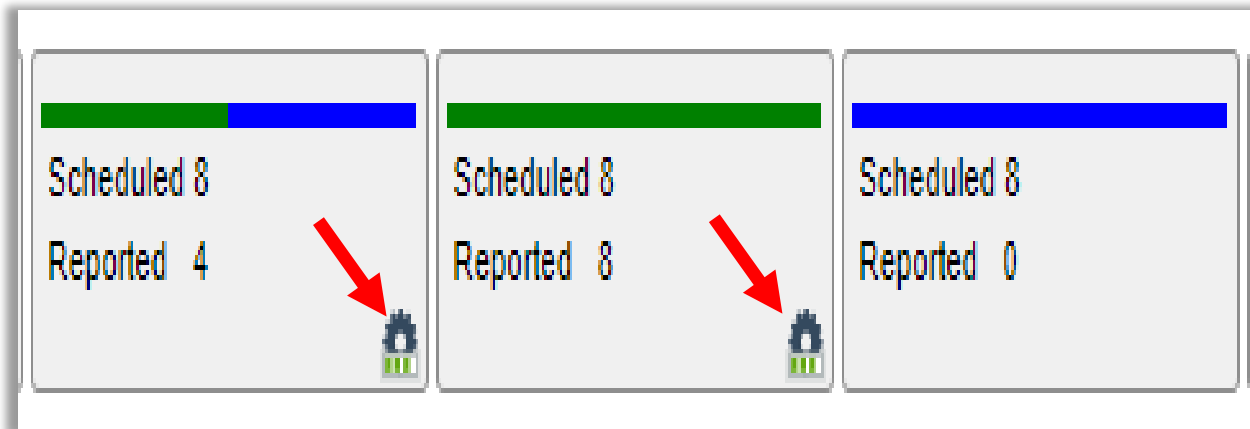
# Reviewing Timesheet Components- TRCs

- To make a timesheet entry, start by clicking the drop-down list in the 'Time Reporting Code' column.

- This list contains all TRSs available for use.

- Select the appropriate code for the type of time used.

# Reviewing Timesheet Components- Reporting Time



- In this example, the ANLVT Time Reporting Code was used to enter hours of Annual Leave Taken.

- After selecting a TRC, simply enter the hours in the field for the date they were used.

- Please note that CAPPS uses decimals, not minutes, for time reporting.

- Tab out of the field and the colored bar for that day will change from blue to green based on the number of hours reported.

# Reviewing Timesheet Components- Adding a Row

- Only one TRC can be assigned to a row. When multiple types of time are used in a week, a new line will need to be added for each additional TRC.

- Scroll to the right side of the timesheet and click the '+' symbol to add a new row.

# Reviewing Timesheet Components- Deleting a Row



- If a new row is added by mistake or is no longer needed, click the '-' to remove the row.

- A system message will pop-up asking for confirmation before the row is removed.

# Reviewing Timesheet Components- Remaining Fields

- Override Reason Codes (ORC) are agency-specific and can be used to better identify or define an employee's time entry.

- The Task field is for agencies to identify or define another level of an employee's time entry.

- The Labor Account Code field is used by some agencies to further define time allocated for special purposes.

- The FMLA/Parental/Mlty IDs are used to designate the Event number when an employee is out on any of these leaves.

- Comments are optional but can be used if any additional explanation is needed.

| Status | Override Reason | Task | Labor Account Code | FMLA/ Parental/ Mlty ID | Comments | | |
|---|---|---|---|---|---|---|---|
| NA | | | | | | + | — |
| NA | | | | | | + | — |

# Reviewing Timesheet Components- View Leave Balances

- Clicking the 'View Leave Balances' link under the TRC field will open the Leave Balances page.

- The Leave Balances page displays all Comp Time plans, balances, earned hours, adjustments, hours taken, and expiring hours.

- Click on any of the Leave Types to see additional details.

# Reviewing Timesheet Components- Detailed Leave Balance View

**Leave Balances**

**Luna Train064**
Director III
Return to Leave Balances

| | |
|---|---|
| Today's Date | 02/28/2022 |
| Last Update | 02/25/2022 |
| Leave Time Off Plan | Compensatory Time |
| Beginning Fiscal Year Balance | 33.500000 |
| Earned Fiscal Year to Date Balance | 19.000000 |
| Taken Fiscal Year to Date Balance | 0.000000 |
| Adjusted Fiscal Year to Date Balance | -32.500000 |
| Pending Approval | 0.000000 |
| Available Balance | 20.000000 |

**Leave Information**                                9 rows

| Expiration Date ◇ | Number of Hours Expiring ◇ |
|---|---|
| 03/05/2022 | 1.000000 |
| 01/07/2023 | 4.000000 |
| 01/14/2023 | 1.500000 |
| 01/15/2023 | 3.000000 |
| 01/28/2023 | 4.000000 |
| 02/04/2023 | 0.500000 |
| 02/05/2023 | 2.000000 |
| 02/11/2023 | 2.000000 |
| 02/19/2023 | 2.000000 |

The Taken Fiscal Year to Date Balance includes ALL approved timesheet entries in the current fiscal year.
The Earned Fiscal Year to Date Balance includes Approved timesheet entries in the current fiscal year less than or equal to today's date.

- In this example, we clicked on Compensatory Time to view more details.

- This detailed view provides a breakdown of the time balances earned, taken, adjusted, pending approval, and available.

- The Expiration Date and Number of Hours Expiring will be displayed at the bottom of this page, if applicable.

# Enter Additional Hours Worked (Exception Time Reporter)



- When adding additional hours worked, enter scheduled hours **PLUS** the additional hours worked.

- The system will automatically calculate the hours and convert to overtime or comp time based on FLSA designation.

# Enter Time for Flex Schedule (Exception Time Reporter)



- When flexing time, the TRC **FLEXS as well as REGHR** need to be used to ensure pay and comp/overtime is accurate.

- FLEXS is used on the date the user is scheduled to work.

- REGHR is used on the date the user actually worked.

# Submitting Time for Flex Schedule (Exception Time Reporter)



- When Flex time is submitted, a system warning will pop-up as a reminder that FLEXS hours must be made up within the same FLSA workweek.

- If used incorrectly, pay could be docked for the week.

# Entering Annual Leave Taken (Exception Time Reporter)



- The **ANLVT** Time Reporting Code is used to represent Annual Leave Taken.

- Once submitted, the leave will show up in the Pending Approval row of the Leave Balance Summary and subtracted from the Available Balance.

# Entering Sick Time Taken (Exception Time Reporter)



- The **SICKT** Time Reporting Code is used to represent Sick Leave Taken.

- Once submitted, the leave will show up in the Pending Approval row of the Leave Balance Summary and subtracted from the Available Balance.

# Entering Regular Comp Time Taken (Exception Time Reporter)



- The **COMPT** Time Reporting Code is used to represent Compensatory Time Taken.

- Once submitted, the leave will show up in the Pending Approval row of the Leave Balance Summary and subtracted from the Available Balance.

# Entering FLSA Overtime Taken (Exception Time Reporter)



- The **FLSAT** Time Reporting Code is used to represent FLSA Overtime Taken.

- Once submitted, the leave will show up in the Pending Approval row of the Leave Balance Summary and subtracted from the Available Balance.

# Entering Leave Without Pay Taken (Exception Time Reporter)



- If no leave is available, the **LWPEO** Time Reporting Code is used to represent general Leave Without Pay Taken.

- There are several Leave Without Pay TRCs, so be sure to select the option appropriate for the situation.

# Entering Time Worked on a Scheduled Holiday (All Time Reporters)



- The **REGHW** TRC is used to represent time worked on a scheduled holiday. (Ex. Memorial Day, Thanksgiving, Christmas.)

- *Both Exception Time Reporters and Positive Time Reporters need to enter this time, otherwise Holiday Comp Time will not be earned.

# Entering Time Worked on an Agency Holiday (All Time Reporters)



- The **AGYHW** TRC is used to represent time worked on an agency holiday.

- *Both Exception Time Reporters and Positive Time Reporters need to enter this time, otherwise Holiday Comp Time will not be earned.

# Entering Time Worked on a Holiday- Over Scheduled Hours



- If any employee <u>works over their scheduled hours</u> on a holiday, the **additional** hours worked would then be coded to REGHR.
  - Example –employee works 10 hours but is only **scheduled for 8 hours**. Timesheet should reflect: 8.00 hours REGHW, and 2.00 hours REGHR.
- If a holiday is **not worked**, <u>no leave should be entered</u> **unless** the employee is scheduled beyond 8 hours. Employees scheduled beyond 8 hours will have the additional hours automatically deducted from their available leave balance through the CAPPS Holiday Cascade process.

# Entering Time Worked on a Holiday- Non-Standard Schedules



- If an employee is authorized for 8 hours on a holiday but is **scheduled for 10 hours** and physically works 10 hours, then the employee should enter 8 hours **REGHW** and 2 hours of **REGHR**.



- If this same employee does not work on the holiday, they need to enter 2 hours of leave on the holiday. CAPPS will automatically deduct available leave up to 2 hours or create an exception if 2 hours of leave is not available.

- Note: The available leave must be from one leave type.

# Entering Time on a Non- Scheduled Holiday



- If a holiday falls on a day an employee is not scheduled and the employee physically works the holiday, then the employee will enter their hours worked with the TRC REGHR.

- This will result in the employee banking comp time for the hours worked.

- The employee will also earn COMPH in their comp time leave balance to account for holiday hours they are eligible for. This will allow them to take the hours for the holiday on another day (Holiday Bank).

# Entering Optional Holiday Time Taken and Work a Holiday (All Time Reporters)



- The **OHCPT** Time Reporting Code is used to represent time taken off for an Optional Holiday.

- *Both Exception Time Reporters and Positive Time Reporters need to enter this time.

- If an Optional Holiday is taken off, the employee must work the next Skeleton Crew Holiday to make up the time.

# Allocating Hours Worked to Labor Account Codes (LACs)



- If a user's role requires them to track the number of hours worked on different projects, a LAC will need to be used on the timesheet. These codes should be provided by a manager.

- The TRC **REGHR** should be used for hours worked on the projects and a separate row is needed for each LAC used.

- In this example, the employee split their time between two projects on Thursday and spent all day on Wednesday working on a single project.

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# Allocating Hours Worked to Labor Account Codes (LACs) Continued



- Scroll to the right side of the page to see the Labor Account Code column and click on the magnifying glass icon to open a list of the LACs available for use.

- Applicable LACs for the agency will be listed in the search results.

# Allocating Hours Worked to Labor Account Codes (LACs) Continued



- Click on the Account Code for the project and it will populate the Labor Account Code field on the timesheet.

- This process will need to be repeated for each row where an LAC is needed.

# Certifying Employee Time



- An agency may require its employees and contingent workers to complete an Employee Time Certification. This is generally done monthly for the prior month.

- To certify time, navigate to the Time Certification page in the left menu and click on 'E-Sign & Certify'.

# Timesheet Status

Hours entered on the timesheet go through several stages as they get ready to be processed by payroll. After an employee enters hours on a timesheet, and selects 'Submit,' the timesheet moves through the following stages:

- **Needs Approval (NA)**- The hours are waiting for the manager to approve or correct.

- **Approved (AP)**- After the manager has approved the hours.

- **Submitted (SB)**- Once the manager approves the hours, the reported hours are processed by Time Administration and sent to payroll.

Once a time entry is Approved (AP) or Submitted (SB) status, the hours are grayed out on the timesheet and cannot be changed by the employee. If a manager modifies the requested hours, the employee will need to re-enter the correct hours on a new line.

# Time Summary



- The Time Summary page displays a monthly overview of employee time.

- Calendar defaults to the current month and begins on the first, regardless of the day of the week.

- View can be changed to Weekly or Bi-Weekly using the 'View By' menu.

- Click on the date or the arrows to the left or right of the date range to view a different month.

# Time Summary Continued



- Clicking a date on the calendar will summarize timesheet entries for the selected date at the bottom of the page.

- From the summary, the timesheet can be accessed for edits by clicking the 'Actions' button and selecting 'Edit Time'.

- If the selected date has an exception, an option to 'View Exceptions' will appear in the More Actions menu.

# Employee Monthly Time Report



- The Employee Monthly Time Report displays all beginning and ending balances for all leave types.

- This report can be run at any time during the current month for the previous month's data.

# Section 2
## My Pay

# Employee Self Service- My Pay Tile Navigation

- From the Employee Self Service dashboard, click on the 'My Pay' tile.

- This is where employees will go to view their paychecks, view compensation history, print tax documents, etc.
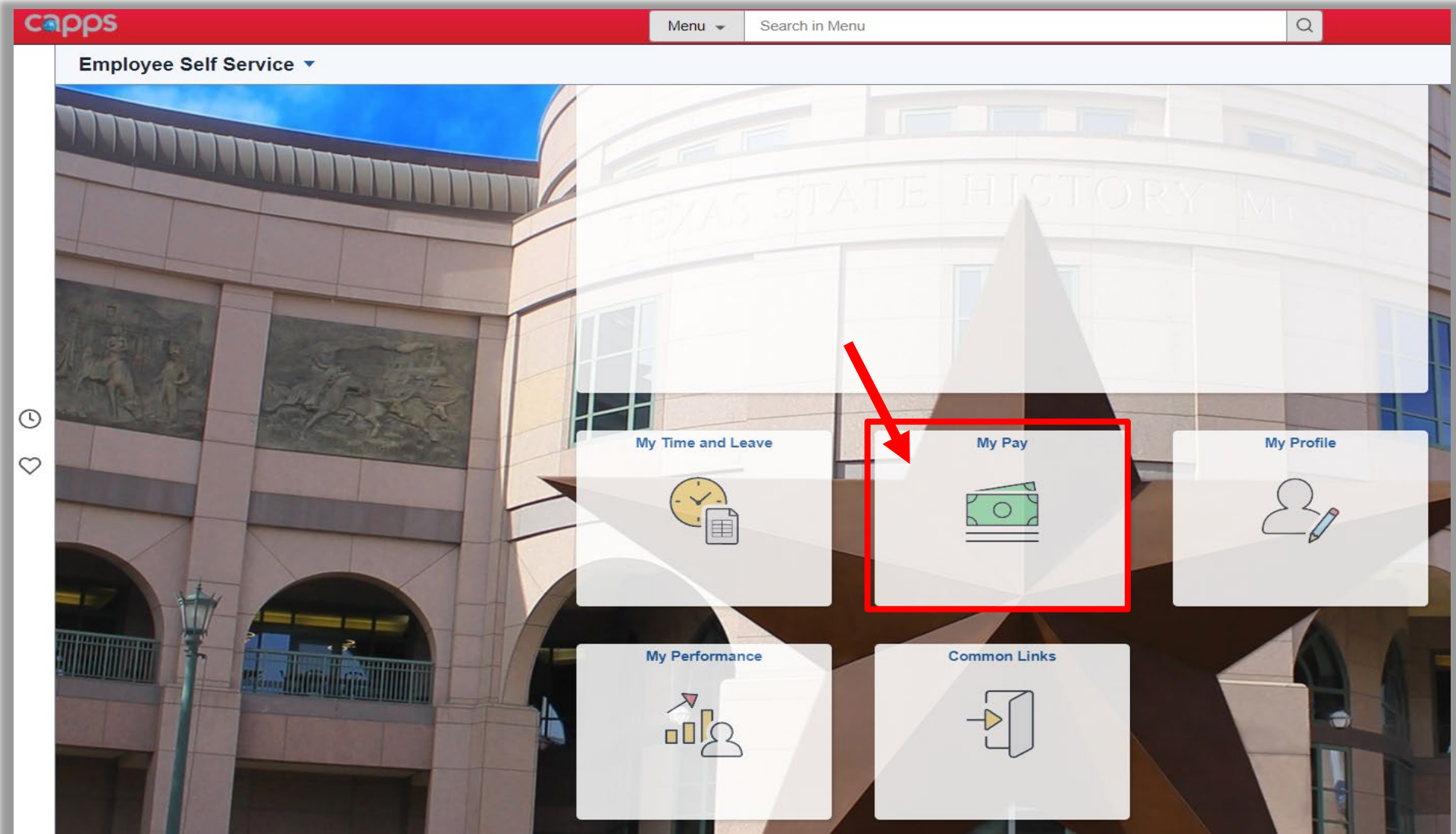
# Employee Self Service- My Pay Menu



- **Paychecks-** Allows users to view and print their earnings statement.
- **W-4 Tax Information**- Allows users to view/modify W-4 Withholding Certificate.
- **W-2/W-2c Consent**- Allows users to consent to receiving electronic W-2 Forms.
- **View Form 1095-C**- Allows users to view 1095-C forms.
- **View Form 1095-C Consent**- Allows users to consent to receiving electronic 1095-C forms.
- **View W-2/W-2c Forms**- Allows users to view/print electronic W-2 forms.
- **Voluntary Deductions**- Allows users to add/modify deductions.
- **View/Edit Direct Deposit**- Allows users to view/edit direct deposit information.
- **View Compensation History**- Allows users to view job/pay change history.
- **Charity Deductions**- Allows users to add/modify charitable deductions.

# View Earnings Statement (Paycheck)



- CAPPS keeps a digital record of the earnings statements generated through the system.

- To view an earnings statement, click on 'Paychecks' in the left menu if it is not selected already. There will be a list of recent paychecks including the check date and payment amount.

- To filter by a specific date range, click on the funnel icon and input the desired dates.

- Click on the row of the desired check to view more details.

# View Earnings Statement (Paycheck) Continued

**View Paycheck**

**Test BRP2**

| | | | |
|---|---|---|---|
| Company | Texas Baseline Agency 052 | Net Pay | $11,374.61 |
| Address | 600 S Maple St | Pay Begin Date | 09/01/2013 |
| | Austin, TX 78701 | Pay End Date | 09/30/2013 |
| | | Check Date | 10/01/2013 |

**General**

| | | | |
|---|---|---|---|
| Name | Test BRP2 | Business Unit | 52100 |
| Employee ID | 00000000194 | Pay Group | T52 Monthly Pay Group |
| Address | 7892 Pay Ave | Department | 1003 - Executive Admin - 1.3 |
| | Austin, TX 78722 | Location | 6003 - 789 Turtle Blvd |
| | | Job Title | Administrative Assistant V |
| | | Pay Rate | $3,020.91 Monthly |

**Tax Data**

| | | | |
|---|---|---|---|
| Fed Tax Status | Married | TX Tax Status | Not applicable |
| Fed Allowances | 5 | W/H Allows | 0 |
| Fed Addl Percent | 0.000 | TX Addl Percent | 0.000 |
| Fed Addl Amount | $52.25 | TX Addl Amount | $0.00 |

**Paycheck Summary**

| Period | Gross Earnings | Fed Taxable Gross | Oasdi Taxable Gross | Med Taxable Gross | Total Taxes | Total Deductions | Net Pay |
|---|---|---|---|---|---|---|---|
| Current | 15,029.80 | 14,029.80 | 0.00 | 15029.80 | 2,655.19 | 1,000.00 | 11,374.61 |
| YTD | 15,745.73 | 14,745.73 | 0.00 | 15745.73 | 2,850.99 | 1,000.00 | 11,894.74 |

**Earnings**

| Description | Hours | Amount | YTD Amount |
|---|---|---|---|
| Base Pay | 368.00 | 5,941.82 | 14,904.55 |

**Taxes**

| Description | Amount | YTD Amount |
|---|---|---|
| Fed Withholdng | 2,301.99 | 2,480.97 |

- The View Paycheck page will open. This is a detailed earnings statement for the selected row.

- The paycheck can be printed by right clicking and selecting 'Print.'

- Creating the PDF Earnings Statements is a step performed by the Payroll Officer during the payroll process.

# View Compensation History



- The Compensation History page allows employees to view promotion, data, and pay rate changes.

- Click the View Compensation History link.

- Compensation History is displayed according to the entries in the From and To Date fields.

- Enter the desired date range by typing in the 'From' and 'To Date' fields or by clicking on the calendar icons.

- Click the 'Refresh Data' button. This will retrieve any new information for the selected dates.

# View Compensation History Continued

| Salary History | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Date of Change | Job Title | Company | Empl Status | Department | Action | Reason | Annual Salary | Compensation per Frequency | |
| 09/01/2021 | Director II | T32 | Active | Operations Admin | Data Chg | FY 22 Conversion | 112,382.280 | 9,365.190000 | Monthly |
| 09/01/2020 | Director II | T32 | Active | Operations Admin | Data Chg | FY 21 Conversion | 112,382.280 | 9,365.190000 | Monthly |
| 09/01/2019 | Director II | T32 | Active | Operations Admin | Data Chg | FY 20 Conversion | 112,382.280 | 9,365.190000 | Monthly |
| 09/01/2018 | Director II | T32 | Active | Operations Admin | Data Chg | FY 19 Conversion | 112,382.280 | 9,365.190000 | Monthly |
| 09/01/2017 | Director II | T32 | Active | Operations Admin | Data Chg | FY18 Conversion | 112,382.280 | 9,365.190000 | Monthly |
| 09/01/2016 | Director II | T32 | Active | Operations Admin | Data Chg | FY 17 Conversion | 112,382.280 | 9,365.190000 | Monthly |

- To view details of a specific action, click on the 'Date of Change' link for the transaction.

# View Compensation History Continued



TX Compensation History

Help

**Compensation History**
**Salary Change Details**

Name:
Test Employee MMM

Date of Change:        12/01/2013

**Salary Change Summary**

|  | Description | | Short Description | |
|---|---|---|---|---|
| Current Salary: | 0.000 | USD | 0.000 | USD |
| Change: | 0.000 | USD | 0.000 | USD |
| Change Percent: | 5.076 | | 5.076 | |
| New Salary: | 18,629.993 | USD | 0.000 | USD |

**Job Information**

| Salary Plan: | A |
|---|---|
| Salary Grade: | 09 |
| Step: | 0 |

**Salary Components**

| Component | New Amount | | | Change Amount | | Change Percent |
|---|---|---|---|---|---|---|
| Base Salary | 2,069.999200 | USD | Monthly | 100.000000 | USD | 5.076 |

Return to Compensation History

- If the selected action is pay impacting, the Salary Change Details page will calculate the change percentage and new salary as well as display the new job information.

- This example shows details about a Merit Increase including the effective date, change percentage, and new salary.

# View/Edit Direct Deposit



- To view/edit direct deposit information, click on the 'View/Edit Direct Deposit' tab. Current direct deposit information will display.

- To view details, click on the account type listed. Account type will either be savings or checking.

# View/Edit Direct Deposit Continued



- The 'Edit Account' screen will pop-up. This page allows employees to modify their routing number, account number, and account type if necessary.

- Please note that in CAPPS there can only be one account set up for direct deposit.

- Users should **NEVER** select 'Yes' for the International Bank Account Option. If 'Yes' is selected, Direct Deposit is inactivated, and will lock the user out.

- Change slider to 'Yes' to authorize the deposit of payments into the account.

- Click the 'Save' button to submit changes.

# Voluntary Deductions

- Employees can opt to deduct a flat amount from a paycheck to be direct deposited at a Credit Union.

- These deductions can begin or end whenever the employee chooses.

- Deductions can be automatically stopped by setting a total maximum amount to be deducted.

- There is no limit to the number of voluntary deductions however there can be no more than three (3) deductions per deduction type.

# Charitable Deductions

- Charitable Deductions can only be established during open enrollment.

- Employees elect a charitable institution from a predetermined list in the program.

- After open enrollment has closed, charitable deductions cannot be added until the next election period. However, employees can edit the dollar amount elected to give.

- Employees can have up to three (3) deductions.

# Update Voluntary Deductions



- To view/add/edit voluntary deductions, click on the 'Voluntary Deductions' tab.

- In this example, the employee has not yet added any voluntary deductions. To add a new deduction, click the 'Add Deduction' button.

# Update Voluntary Deductions Continued



- Use the magnifying glass icon in the 'Type of Deduction' field to search for the desired deduction type.

- Enter the desired amount to be deducted per pay cycle.

- Option 1 should be used if an employee wants deductions to stop based on a "goal amount" or the total amount to be deducted.

- Option 2 should be used if an employee wants deductions to continue until a specified date.

- Click 'Submit' to save the deduction.

- A message will pop up to make sure the changes are correct. Click 'OK' to save.

# Update Voluntary Deductions Continued

**Voluntary Deductions**

Replacement Manager Change1

Texas Baseline Agency T32

Review, add or update your voluntary deductions information.

**Voluntary Deductions**

| Deduction Type | Start Date | Stop Date | Status | Deduction | Goal Amount | Goal Balance | |
|---|---|---|---|---|---|---|---|
| CrUn-Access CU | 03/21/2022 | 03/21/2025 | Currently | $100.00 | | 0.00 | Edit |

Add Deduction

- Changes are now saved and will appear on the Voluntary Deductions page.

- This page updates after each pay cycle when deductions are made.

- The Deduction field identifies the amount being deducted per pay cycle.

- The Goal Amount represents the total amount to be deducted.

- The Goal Balance field represents the total amount deducted to date. When the Goal Balance matches the Goal Amount the deductions will stop.

# Update Charitable Deductions



- Charitable Deductions can only be established during open enrollment. Employees can elect a charitable institution from a predetermined list in the program.

- After the enrollment period is over, employees have the option to edit or delete existing charitable deductions throughout the year from the 'Charity Deductions' tab.

# Update W-4 Tax Information



- The 'W-4 Tax Information' tab allows employees to update W-4 information through the system.

- Before entering W-4 tax information employees should validate that their name, social security number, and address are correct.

- When employees are hired within the agency, their filing status will be Single or Married filing separately. To change this status, go to this page and follow the IRS instructions for entry.

# Update W-4 Tax Information Continued

## Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all these jobs.

ⓘ View Instructions

☐ Multiple Jobs or Spouse Works

Complete Steps 3 through 4(b) on Form W-4 for only one of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3 through 4(b) on the Form W-4 for the highest paying job.)

## Step 3: Claim Dependents

ⓘ View Instructions

If your income will be $200,000 or less ($400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by $2,000 [          ]

Multiply the number of other dependents by $500 [          ]

Other tax credits [          ]

Total

## Step 4: Other Adjustments

ⓘ View Instructions

(a) Other Income [          ]

(b) Deductions [          ]

(c) Extra Withholding [          ]

## Claim Exemption from Withholding

I claim exemption from withholding for the year [ 2022 ] and I certify that I meet BOTH of the following conditions for exemption from withholding:

- Last year I owed no federal income tax.
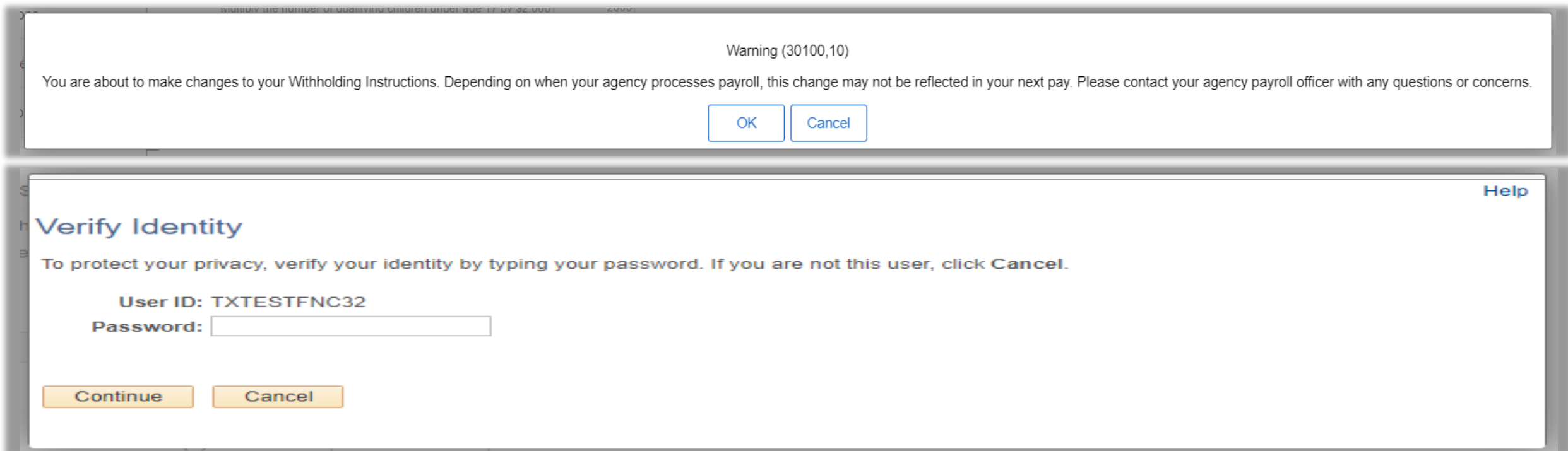- This year I expect to owe no federal income tax.

☐ Check this box if you meet both conditions to claim exemption from tax withholding

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

[ Submit ]

- Steps 2-4 only need to be filled out if applicable.

- Click 'View Instructions' to view IRS instructions included with each step.

- Once entries are completed, click the 'Submit' button to save.

# Update W-4 Tax Information Continued



Warning (30100,10)

You are about to make changes to your Withholding Instructions. Depending on when your agency processes payroll, this change may not be reflected in your next pay. Please contact your agency payroll officer with any questions or concerns.

OK     Cancel

Help

## Verify Identity

To protect your privacy, verify your identity by typing your password. If you are not this user, click **Cancel**.

User ID: TXTESTFNC32
Password: _____

Continue     Cancel

- A warning message will appear upon submitting the changes. This warning indicates that due to the timing of the payroll processes, this change may not be reflected until the next pay period. Click the 'OK' button.

- CAPPS needs to confirm the identity of the employee requesting these changes so employees will be asked to enter their password on the 'Verify Identity' pop-up message.

# Provide W-2 and W-2c Consent



- The 'W-2/W-2c Consent' tab allows employees to consent to receiving their W-2 in electronic format only. W-2c forms will still be provided in a paper format only regardless of this consent.

- Select the 'I Consent' checkbox and click the 'Submit' button.

- The system will ask for a password to verify the employee's identity.

# View/Print W-2 and W-2c Information



- If an employee has consented to receiving their W-2 form electronically, they will receive an email when it is ready for them to view in the system.

- Click on 'View W-2/W-2c Forms' in the left menu to view the available forms.

- The Tax Year can be changed by clicking on the drop-down menu at the top of the page.

- To view the W-2 form, click on the 'View Form' button.

# View/Print W-2 and W-2c Information Continued



- The W-2 will open in a new tab.

- This form can be printed or saved by selecting the appropriate icon from the top menu bar.

# Provide 1095-C Consent



- The 'Form 1095-C Consent' tab allows employees to consent to receiving their 1095-C electronically.

- Select the 'I Consent' checkbox and click the 'Submit' button.

- The system will ask for a password to verify the employee's identity.

# Thank You!

## CAPPS.Training@cpa.Texas.gov