CAPPS Personal & Payroll Info Quickstart

Follow these procedures to check and update your personal and payroll information in the CAPPS system.

Note: If this is your *first* experience with the system, please start at the top and go through all the procedures. At any time, simply click on the link to find the needed procedures:

View and Update My Personal Information - eProfile

Example - Edit Your Address

View and Update My Payroll Information – ePay

Direct Deposit
W-4 Tax Information
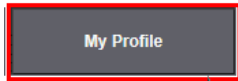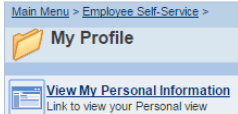W-2 Consent and Access
Voluntary or Charitable Deductions
View/Print Earnings Statement

View and Update My Personal Information - eProfile

1. Access CAPPS.
2. Click **My Profile.**

3. Click **View My Personal Information**.

The personal Information Summary appears listing the following:

- Name – Change requires HR approval
- Phone Numbers
- Emergency Contacts
- Email Addresses
- Information Release Indicator- Employees cannot change this
- Disability Indicator – (voluntary only) Meet with HR to discuss disability issues.
- Employee Information – Contact HR for any changes

Note: Most sections contain a check mark indicating the employee's Preferred or Primary information.

4. Scan through your current systems information to verify everything is correct.
5. To change any value click the **Change** bar associated with that item.
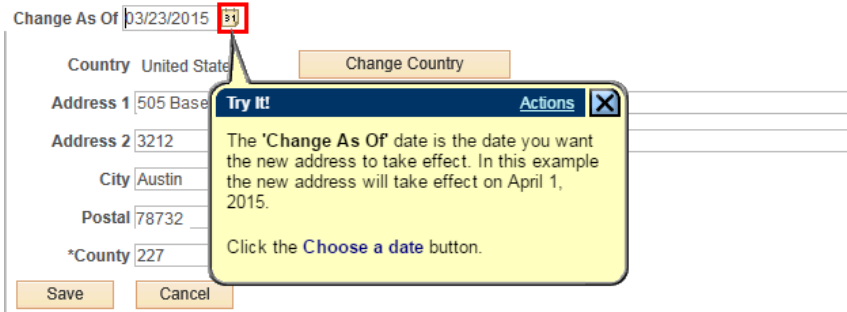
Note: You may also edit your personal information directly from the **My Profile** page rather than viewing your full personal information.

Example - Edit Your Address

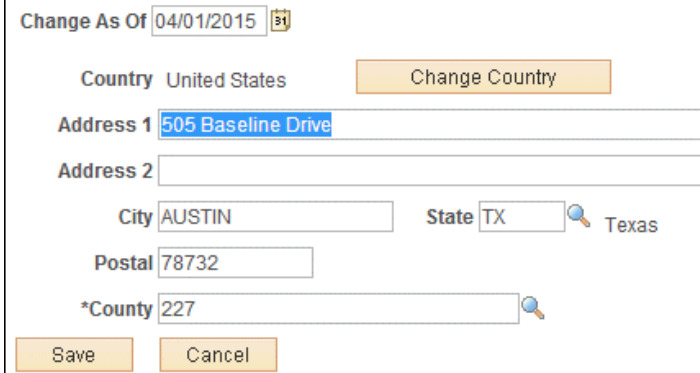1. With the editor open click on the **Change as of** date

Edit Mailing Address

Change As Of 03/23/2015 📅

Country	United State
Address 1	505 Base
Address 2	3212
City	Austin
Postal	78732
*County	227

Change Country

Save   Cancel

Try It!   Actions ❎

The 'Change As Of' date is the date you want the new address to take effect. In this example the new address will take effect on April 1, 2015.

Click the **Choose a date** button.

2. Use the dropdown to select your month and day.

Note: if you select a month a day in the future, both current and future entries will display for your address.

3. Update your address, zip code, and county in the fields provided.
4. Click the **Save** and then the **OK** buttons.

Edit Mailing Address

Change As Of 04/01/2015 📅

Country	United States
Address 1	505 Baseline Drive
Address 2	
City	AUSTIN
State	TX 🔍 Texas
Postal	78732
*County	227 🔍

Change Country

Save   Cancel

Note: You may change most of your other personal information in the same manner as this example. For name changes, contact HR.

Note: Click **Home** to go back to the top level-landing page.

View and Update My Payroll Information – ePay

Click the **My Pay** button to view and manage various aspect of your payroll related information.
Note: you may also click Employee Self-Service>My Pay on any page.
You should view and update the following upon first accessing the system:

- Direct Deposit
- W-4 Tax information
- Deductions- Voluntary, Non-Benefits
- Set your consent to receiving W-2 electronically

Main Menu » Employee Self-Service »

📁 **My Pay**

View/Print Earnings Statement Review and Print current and prior paychecks.	**View/Edit Direct Deposit** Add or update your direct deposit information.	**Voluntary Deductions** View/Edit Voluntary Deductions
W-4 Tax Information Review or change your W-4 information.	**View Compensation History** Review Compensation History including Promotions, Data and Pay Rate Changes.	**View W-2/W-2c Forms** View electronic copy of W-2 and W-2c forms.
W-2/W-2c Consent Grant or withdraw consent to receive electronic W-2 and W-2c forms.	**2015 Charity Deductions** 2015 Charity Deductions	

Direct Deposit

1. Access the CAPPS system.
2. If already in the system, click Home.
3. Click the My Pay button.
4. Click the View/Edit Direct Deposit link.
5. The current Direct Deposit information displays.

Note: CAPPS only allows *one* direct deposit account.

6. To view Direct Deposit details, click the Account Type link.
7. Click the Return to Direct Deposit link.
8. To change your Direct Deposit information, click the Edit button.

Direct Deposit

Employee AAA

Review, add or update your direct deposit information.

Direct Deposit Detail

Account Type	Routing Number	Account Number	Deposit Type	Amount or Percent	Deposit Order	
Savings	1111111111	99999999	Balance of Net Pay		999	Edit

9. If you know the Routing Number, you can type it directly in the box.
10. If you do not know the Routing Number, you can use the Look Up Glass to locate your bank's Routing Number.
11. Click in the Account Number field.
12. Enter the new Bank Account Number into the Account Number field.
13. Click on the drop down arrow to select **Checking or Savings**.
14. In the Internationsl ACH Bank Account box click NO.
    -Clicking Yes will stop your dirct deposit and you must contact the Payroll Department to reactivate.

15. Check the Authorization box.

16. To accept the change, click the **Submit** button.

Note: To ensure changes to your Direct Deposit account will be processed in time for your next paycheck, changes need to be entered no later than the 7th day of the month. If you make changes after the 7th day, you could potentially receive a check. If you have any questions related to Direct Deposit, contact the Payroll department.

W-4 Tax Information

1. Access the CAPPS system.
2. If already in the system, click Home.
3. Click the My Pay button.
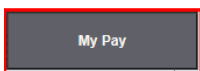
4. Click the **W-4 Tax Information** link.

Note: Before entering your W-4 tax information you should always validate that your name, social security number, and address information is correct.

- If your social security number is incorrect, contact your Human Resources office.
- If your address is incorrect, you can correct (edit) the information in My Profile/View and Update My Personal info.
5. Enter the total number of Allowances you are claiming in the field.
6. Enter the additional amount, if any, you want withheld from each paycheck in the field.
7. The radio buttons here allow you to select either Single or Married status.
8. Select the check box for 'Check here and select Single status if married but withholding at single rate.' if this is applicable for your tax withholding status.

Home Address

4321 Baseline Street
AUSTIN, TX 78732

W-4 Tax Data

Enter total number of Allowances you are claiming [1]

Enter Additional Amount, if any, you want withheld from each paycheck [50.00]

Indicate Marital Status   ◉ Single   ○ Married

☑ Check here and select Single status if married but withholding at single rate.
Note: If married, but legally separated, or spouse is a nonresident alien,
select 'Single' status.

☐ Check here if your last name differs from that shown on your social security card.
You must call 1-800-772-1213 for a new card.

9.   Click the scrollbar.

10. For exempt status, read the conditions listed and check the box if applicable.

I claim exemption from withholding for the year [2015] and I certify that I meet
BOTH of the following conditions for exemption

1. Last year I had a right to a refund of ALL Federal income tax withheld
   because I had NO tax liability.

2. This year I expect a refund of ALL Federal income tax withheld
   because I expect to have NO tax liability.

☐ Check this box if you meet both conditions to claim exempt status.

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]

11. When you have completed filling out the W-4 tax data, click the Submit button.
12. Enter your CAPPS login password in the Password field.
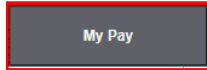13. This should be your own unique password. Use the same password that you used to sign-in.
14. Click the **Continue** button.

W-2 Consent and Access

CAPPS allows you to view your W-2 electronically if you provide consent.

1. Click the My Pay button.

    [My Pay]

2. Click the W-2/W-2c Consent link.
3. To receive your W-2 electronically, click the Check here to indicate your consent to receive electronic W-2 and W-2c forms check box. - This Function is not working in UAT
4. Click the Submit button and enter your password.

You may now view and print your W-2 when it is available.

1. Click the My Pay button.
2. Click the **View W-2/W-2c Forms** link.
3. Click the **Year End** Form link.
4. Your W-2 Form will appear.
5. Click the **Print** button.

Note: You may also view and print the W-2 filing instructions.

Voluntary or Charitable Deductions

You may set up either **Voluntary** or **Charitable Deductions** via CAPPS MyPay.

1. Click the My Pay button.

    [My Pay]
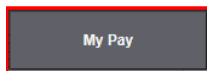
2. Click the **Voluntary Deductions** or **Charitable Deductions** link as desired.

Note: Charitable deductions can be added only once per year, during the annual SECC campaign. You may set up a maximum of three deductions during the open enrollment period. The following procedure sets up a Voluntary Deduction. Set up Charitable Deductions in a similar manner.

3. Click the Add Deduction button.
4. Click the Look up ***Type of Deduction** button.
5. Click the scrollbar to navigate down the selection list and select your type of deduction.
6. Click in the Enter Amount to be deducted field.
7. Enter the amount to be deducted into the Enter Amount to be deducted field.
8. Select either Option 1 or Option 2 when entering your Voluntary Deduction.
*   Option 1 - Goal Amount is used to set the total amount to be deducted.
*   Option 2 - Deduction Stop Date is used when you want your deductions to stop on a specific date.

Note: If you selected Option 1 when setting up your voluntary deduction and need to stop your deduction you can add a Deduction Stop Date.

9. Click **Submit** and **OK.**

Add Voluntary Deduction

Richard Eaton
TX Higher Ed Coordinating Brd

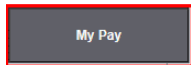*Type of Deduction [ ]

*Enter Amount to be deducted. [0.00]

Option 1: Take deduction until I reach this Goal Amount [ ]

Option 2: Enter Deduction Stop Date (MM/DD/YYYY) [ ] 📅 (example: 12/31/2000)

Current Balance 0.00

[Submit]

View/Print Earnings Statement

1. Access CAPPS.
2. Click the **My Pay** button.

[My Pay]

3. Click the **View/Print Earnings Statement** link.

Note: Only Earning Statements generated in CAPPS will appear on this page. As time progresses, additional Earning Statements will be available. Use the **View All** link to display additional Earning Statements.

4. Click the date of the Earnings Statement that you want to view. Click the scroll bar to navigate down the page.

   The Earnings Statement for the date you selected will automatically appear

View Paycheck

Employee AAA

Company
Agency Name Appears Here

Net Pay $4,761.80

Pay Begin Date 12/01/2014

Address
Agency Address Appears Here

Pay End Date 12/31/2014

Check Date 01/21/2015

Review the details of your paycheck. To view other checks, select   View a Different Paycheck
General

Name Employee AAA

Business Unit 00000

Employee ID 0000000004

Pay Group Monthly Pay

Address 505 Baseline Street
AUSTIN, TX 78732

Department 000001

Location

Job Title
Pay Rate $6,591.45

The top portion of the Earnings Statement contains General and Tax Withholding information.

The middle portion of the Earnings Statement contains your Paycheck Summary, Earnings, and Tax withholding information.

Paycheck Summary

Period	Gross Earnings	Fed Taxable Gross	Oasdi Taxable Gross	Med Taxable Gross	Total Taxes	Total Deductions	Net Pay
Current	6,591.45	6,567.87	6,567.87	6,567.87	1,745.97	83.68	4,761.80
YTD	6,591.45	6,567.87	6,567.87	6,567.87	1,745.97	83.68	4,761.80

Earnings

Description	Hours	Amount	YTD Amount
Base Pay	184.00	6,591.45	6,591.45

Taxes

Description	Amount	YTD Amount
Fed Withholdng	1,243.53	1,243.53
Fed MED/EE	95.23	95.23
Fed OASDI/EE	407.21	407.21

The bottom portion of the Earnings Statement contains Before and After Tax Deduction, and Employer Paid Benefits.
The Net Pay Distribution box contains banking information.

Before-Tax Deductions

Description	Amount	YTD Amount
DEN	23.58	23.58
Total:	23.58	23.58

After Tax Deductions

Description	Amount	YTD Amount
STD	19.39	19.39
LTD	40.71	40.71
Total:	60.10	60.10

Employer Paid Benefits

Description	Amount
MED	535.44
Basic Life	2.22
ERS STS	494.36
PRC - RTW	32.96
* Taxable	
Total:	1,064.98

Net Pay Distribution

Payment Type	Paycheck Number	Amount
Direct Deposit	00000	4,761.80

5. To print your earnings statement right-click in any open space with your mouse.

Note: You can also use the print icon at the top of the page.

6. Click the **Print**... option from the menu.
7. Select the applicable printer at the top of the pop-up window.
8. Click the **Print** button.