Manager Checklist - Onboarding for ERS Return to Work Retirees Checklist

Step	Activity	Description	Go here for help…	Status
[Before the First Day]				
1.	Set applicant as "Ready to Hire" in the Hiring Center	• Work with the Service Center recruiter to ensure that all due diligence and recruitment activities have been completed. • Verify that the applicant is eligible to return to work. An applicant who retired from state employment under the Employees Retirement System (ERS) must remain off the state payroll for 90 calendar days from the date of retirement before returning to state employment. • Ensure the applicant has been set to ready to hire in the hiring center • Record "Applicant ID" or "Employee ID" for use in the onboarding process.	• Service Center (1-888-894-4747) • Hiring Center User Guide	☐
2.	Instruct employee to bring I-9 docs on 1st day	Proof of work eligibility and identification should be presented by the new employee on the first day of employment.	• I-9 Help Guide • I-9 Form • HR Policy Manual • HR Guidance Handbook	☐
3.	Instruct employee to bring proof of veteran status on 1st day (optional)	If not already provided during the hiring process, proof of veteran status (DD214, Certificate of Release or Discharge from Active Duty) should be presented if the employee identified as a veteran on his or her application, or if the employee failed to self-identify on the application but would like to correct this disclosure.	HHS HR Veteran/Military Liaison	☐
4.	Requesting IT services for full-time employees (if applicable)	If the employee does not have an employment record/employee ID with HHSC, DSHS, or DFPS, you may begin the process of requesting IT services for full-time employees - including devices, software, network access and access to Enterprise Portal applications before the applicant's start date (at least four days, but not more than 10 days): • Register (if necessary) and login to the Enterprise Portal. • Under Staff Management, select **Manage Early Onboarding**. • Follow the on-screen instructions for requesting the desired network and system access.	IT Help Desk 7 a.m.-7 p.m. (CST), Mon.-Fri. 855-435-7181 512-438-4720	☐
5.	Submit service request to the Help Desk to activate Telecom services	• You will need to create/open a Help Desk ticket to request Telecom Services for your new employee. You may begin the process of requesting services one week prior to the employee's start date. • Submit a service request to the Help Desk to activate Telecom services (e.g., desk phone, softphone, call center).	• Consolidated Help Desk 512-438-4720 855-435-7181 • Help Desk	HHS Connection (texas.gov)	☐

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\[First Day Steps]				
1.	Collect and transmit Veteran Documentation (optional)	If applicable, collect the employee's DD214 and send the form to HHS HR using **one** of the methods below: 1. Mail hard copy form to HHS HR Records Management Unit, 4601 W. Guadalupe St., MC-1530, Austin, TX 78751, and mark CONFIDENTIAL. 2. Fax record to the appropriate number below, with a coversheet addressed to the HR Records Management Unit: ▪ HHSC: 512-206-3952 ▪ DSHS: 512-206-3953 3. Scan and send an email message with the completed form to your agency mailbox listed below: ▪ HHSC: HHSCnewhiredocuments@hhs.texas.gov ▪ DSHS: DSHSnewhiredocuments@hhs.texas.gov	HHS HR Veteran/Military Liaison	☐
2.	Instruct employee to complete Section I of the I-9 form	Collect the I-9 Form and supporting documents (List A document, or List B and C documents) from the employee, with Section I completed.	HHS HR, Records Management	☐
3.	Review I-9 Form and Employment Eligibility Verification (for new hires and rehires)	• Review the documentation presented by the employee and complete the Employer sections of the form. • Return List B and C documents (if presented) to the employee.	• Manager Onboarding Process User Guide • I-9 Help Guide • I-9 Form • HR Policy Manual • HR Guidance Handbook • Service Center (1-888-894-4747)	☐
4.	Transmittal of I- 9 documents to HHS HR Records Management for E-Verify processing and filing	• Scan and send an email message with the I-9 and List A document (if presented) to your agency mailbox listed below: ○ HHSC: HHSCnewhiredocuments@hhs.texas.gov ○ DSHS: DSHSnewhiredocuments@hhs.texas.gov **Note:** If a List A document is presented, the document emailed to HR **must be scanned in color** (see agency procedures for color scanning instructions). If a U.S. Passport is presented for the I-9, ensure a copy of the barcode page is also included with the passport photo. The barcode page is the last page in the passport booklet. List B and C documents (if presented) are not emailed to HR. Return List A document (if presented) to the employee.	HHS HR, Records Management	☐

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5.	Instruct Employee to complete the Acceptable Use Agreement Form	• Print out the HHS Enterprise Acceptable Use Agreement, and have the employee complete the form. ***Note: You may need to enter your email address and network password when you click on this link***. • Send the AUA form to HHS HR using **one** of the methods below: 　1. Mail hard copy form to HHS HR Records Management Unit, 4601 W. Guadalupe St., MC-1530, Austin, TX 78751, and mark CONFIDENTIAL. 　2. Fax record to the appropriate number below, with a coversheet addressed to the HR Records Management Unit: 　　▪ HHSC: 512-206-3952 　　▪ DSHS: 512-206-3953 　3. Scan and send an email message with the completed form to your agency mailbox listed below: 　　▪ HHSC: HHSCnewhiredocuments@hhs.texas.gov 　　▪ DSHS: DSHSnewhiredocuments@hhs.texas.gov	HHS HR, Records Management	☐
6.	Instruct Employee to click the **New Employees!** link on the CAPPS login page	• If the employee has computer access, instruct new employee to click on the New Employees! link on the CAPPS login page to review the checklist and complete the required tasks. ***Note: Employee ID is not needed to access this page.*** • If the employee does not have computer access, print and provide the employee with a copy of the New Employee's Checklist. You will also need to print and provide copies of the forms referenced throughout the remaining steps of this checklist.	New Employee's Checklist	☐

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7.	Instruct employee to complete a Return-to-Work Retiree Benefits Election Form	• Employee **must** indicate desire to stay on retirement benefits **or** choose benefits as an active employee. • The Benefits Election Form for Return-to-Work Retirees and the Dependent Child Certification, (if applicable) **must** be completed regardless of employee's decision to go active or to stay on retirement benefits. • If the employee selects benefits as an **active employee** or elects to stay in **retired status**: o Instruct the employee to complete and provide you his or her Benefits Election Form for Return-to-Work Retirees and the Dependent Child Certification (if applicable). • Once you receive the completed form(s), make copies for the employee if he or she is unable to do so, then take the following action: • Send the form(s) to the HHS Benefits Coordinator (HHS Employee Service Center) using **one** of the methods below: 1. Email the forms to hhsservicecenter.bef@ngahrhosting.com. 2. Fax the forms to 1-866-245-3659. *Note: The Service Center Benefits team will take the action necessary in the Employees Retirement System portal to enroll the employee in the benefits programs selected on the forms. Once the entries are made, the Service Center will send you a confirmation of enrollment email. Make sure you share the information with your new employee.* • Send the employee's Benefits Election Form for Return-to-Work Retirees and the Dependent Child Certification (if applicable) to HHS HR using **one** of the methods below: 1. Mail hard copy forms to HHS HR Records Management Unit, 4601 W. Guadalupe St., MC-1530, Austin, TX 78751, and mark CONFIDENTIAL. 2. Fax records to the appropriate number below, with a coversheet addressed to the HR Records Management Unit: ▪ HHSC: 512-206-3952 ▪ DSHS: 512-206-3953 3. Scan and send an email message with the completed forms to your agency mailbox listed below: ▪ HHSC: HHSCnewhiredocuments@hhs.texas.gov ▪ DSHS: DSHSnewhiredocuments@hhs.texas.gov	Service Center (1-888-894-4747)	☐
8.	Complete new employee personal data	• Navigate to the **Select Candidate** page. o Locate the **Manager Self-Service** section in the CAPPS left navigation menu. o Click the **New Hire** link. o Click **Hire Candidate**.	• Manager Onboarding Process User Guide • Service Center (1-888-894-4747)	☐

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		• After selecting the name of the applicant, the **Personal Data** tab appears. Enter, verify, and/or correct the information on this screen, such as Postal Code, Date of Birth and the employee's Address (mailing address).		
9.	Enter the Work Eligibility Info for employee	• Click on the **Work Eligibility** tab at the top of the page. • Select the appropriate group box and record that documentation that was presented by the new employee. [See Step 2] ***Note:** If the employee is a non-US citizen enter the necessary work permit and/or visa information for the employee.*	• [Manager Onboarding Process User Guide](#) • [I-9 Help Guide](#) • [I-9 Form](#) • [HR Policy Manual](#) • [HR Guidance Handbook](#)	☐
10.	Enter the employee's hire effective date and verify probation date	• Click on the **Job Data** tab at the top of the page. • Enter the effective date when the applicant assumes his or her new position. o New Hire or HHS Rehire with a break in service – set effective date to the date the employee starts at the agency. ***Note:** If the month begins on a holiday or weekend and the employee is starting at the beginning of the month, the hire effective date should still be set to the 1st. Otherwise set the effective date as the first physical day at work.* • If the probationary period is more than 6 months, record the approved length in the Probation Date field.	[Manager Onboarding Process User Guide](#)	☐
11.	Verify Payroll Data	• Click on the **Payroll Data** tab at the top of the page. • Verify salary. • Verify Pay Group. ***Note:** If the employee is entering a facility position and the salary group is A11 or below, the pay group defaults as semi-monthly. You may change the Pay Group to MON (Monthly) if the employee wishes to be paid monthly.*	[Manager Onboarding Process User Guide](#)	☐
12.	Save the New Hire Transaction	• Click Save. You may see a few messages for informational reasons only, review and click "OK" to dismiss. • Once the save is successful, you will see a message indicating the transaction was successfully completed. ***Make note of the Employee ID displayed on the screen – this must be provided to the employee.*** The employee should have the same Employee ID as he or she had at retirement if the employee was from an HHS Agency.	• [Manager Onboarding Process User Guide](#) • Service Center (1-888-894-4747)	☐

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Step	Activity	Description	Go here for help…	Status
13.	Request Security role for newly hired managers	For newly hired managers who will need the security access, contact agency position control.	Agency Position Control	☐
14.	Request Network & System Access (if not already requested before applicant's first day)	You may begin the process of requesting IT services for full-time employees – including devices, software, network access, and access to Enterprise Portal applications after the employee has been onboarded in CAPPS. • Manager logs into the Enterprise Portal. • Under Staff Management, select **Manage Staff.** • When the employee is updated in CAPPS to the new department, they become available under the hiring manager in the Enterprise Portal. • Select the employee's name. • Follow the on-screen instructions for requesting the desired network and system access. • HHSC (other than those listed below) register and login to the Enterprise Portal and request network access under the manage access tab for new network access. o State Hospitals to complete the DSHS Network Form (MS Word). Contact your local Facility Automation Manager for assistance with completing the form. o State Supported Living Centers to complete **HHSC IT Form IS777** (contact your SSLC Facility Manager for directions on where to locate the form). o Legacy DADS [(now HHSC), all Regions *except Region 00*] employees to complete Form 4743, Access Request to Applications and Systems (PDF). o Legacy DSHS (now HHSC) employees to complete a DSHS Network Form (MS Word). • DSHS employees to complete a DSHS Network Form (MS Word). To request access to job-related applications, direct the employee to register on the HHS Enterprise Portal. ***Note***: *The manager may request access to job-related applications on behalf of the employee provided the employee has logged into the Enterprise Portal and successfully completed the AUA form.*	• Network & System Access • State Hospitals - contact your Facility Automation Manager • State Supported Living Centers - contact your site Facility Manager • DSHS Online, Information Technology Section • IT Help Desk 7 a.m.-7 p.m. (CST), Mon.-Fri. 855-435-7181 512-438-4720	☐
15.	Instruct employee to sign up for Multi-Factor	Instruct the employee to sign up for Multi-Factor Authentication (MFA) (Required for All Office 365 (O365) and Virtual Private Network (VPN) Users). ***Note***: *The purpose of MFA is to add another layer of security to protect VPN services and when away from the office using O365 applications such as Teams, SharePoint and Outlook Web Access.*	IT Help Desk 7 a.m.-7 p.m. (CST), Mon.-Fri. 855-435-7181 512-438-4720	☐

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	Authentication (MFA)	• Have the employee sign up for MFA using a personal computer or cell phone prior to picking up any state-issued laptop or accessing VPN and applications. • Open How to Register for MFA (PDF) and visit MFA webpage for other helpful information like how to use MFA and how to change your authentication information.		
[Following Day Steps]				
1.	If necessary, update Work Schedule, Intermittent Shift Differential, or Shift Rate Pay	• If Work Schedule or Intermittent Shift Differential needs to be updated, navigate to the **View/Edit Time & Leave Setup** page and make the update: o Locate the **Manager Self-Service** section in the CAPPS left navigation menu. o Click the **Time and Leave Management** link. o Click the **View/Edit Time and Leave Setup**. o Click name of employee. • If Shift Rate Pay needs to be added or updated for an eligible employee, navigate to the **Maintain Shift Differential Pay** page and make the update: o Locate the **Manager Self-Service** section in the CAPPS left navigation menu. o Click the **Compensation Management** link. o Click **Maintain Shift Pay Rate**. o Click name of employee.	• Time and Leave User Guide • Compensation Management User Guide	☐
2.	Instruct employee to login to CAPPS and complete training courses and verify personal information	• Give the employee the Employee ID provided to you after completion of step #11 (First Day Steps). • Instruct the employee to complete the courses below on the System Training Solutions website within the first 30 days of employment. ***Note: This link can only be accessed from a device connected to the HHS network.*** To access the link through CAPPS, the employee should login to CAPPS, locate the **Learning/Training** section in the center navigation menu, click on the *System Training Solutions (only accessed from a device connected to the HHS network)* link. Once the requested information is entered, a list of training courses appears. Select the appropriate link to complete each required training: o HHS Information/Security/Cybersecurity Training o Civil Rights Training o Employee Time Labor and Leave o Employee Safety and Security Awareness o HHS Privacy Training o Be the One in the Fight Against Human Trafficking o Records Management at HHS o Labor Account Code Training **(For DSHS employees ONLY)** o Managing Employee Performance and Conduct Issues **(ONLY for employees who are managers/supervisors)**	New Employee's Checklist	☐

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		- Instruct DSHS employees to complete the agency required FEMA Training (on the <u>DSHS Train Texas</u> website) within the first 6 months of their employment. - Instruct the employee to complete the Ethics Training for HHS Employees on the <u>System Training Solutions</u> website within the first 60 days of employment. ***Note**: To locate the assigned Ethics course, log into CAPPS, navigate in Employee Self-Service to My Training, then My Required Training Report.* - Instruct manager/supervisor employees to complete the CAPPS Training Program for Managers on the <u>System Training Solutions</u> website (or the <u>iLEARN</u> website for facility employees) within the first 60 days of employment. ***Note: These links can only be accessed from a device connected to the HHS network.*** Instruct manager/supervisor employees with direct reports (including delegates) to complete the Job Descriptions and Audit Training on the <u>System Training Solutions</u> website (or the <u>iLEARN</u> website for facility employees) before submitting a job audit request. ***Note: These links can only be accessed from a device connected to the HHS network.*** - Instruct the employee to complete the following tasks: - Review and verify personal information. Instruct the employee to locate the **Employee Self-Service** section of the screen, click the **My Profile** link and select the **View My Personal Information** from the menu options. - Review and complete the required pay information. Instruct the employee to locate the **Employee Self-Service** section of the screen, select the **My Pay** link and review and complete the information contained in each available menu option, specifically the **View/Edit Direct Deposit** (if applicable), **W-4 Tax Information** and **W-2/W-2c Consent** options. ***Note: The W-4 defaults to single and 0 if no entry is completed prior to payroll running.***		

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3.	Instruct employee to complete additional New Hire Forms	• Instruct the employee to complete the HR0312, Acknowledgement by New Employees. • If the employee is being hired into a temporary position, instruct the employee to complete the HR0301, Temporary Employment Agreement. • Send the HR0312 and HR0301 (if appropriate) to HHS HR using **one** of the methods below: 1. Mail hard copy form to HHS HR Records Management Unit, 4601 W. Guadalupe St., MC-1530, Austin, TX 78751, and mark CONFIDENTIAL. 2. Fax record(s) to the appropriate number below, with a coversheet addressed to the HR Records Management Unit: ▪ HHSC: 512-206-3952 ▪ DSHS: 512-206-3953 3. Scan and send an email message with the completed form to your agency mailbox listed below: ▪ HHSC: HHSCnewhiredocuments@hhs.texas.gov ▪ DSHS: DSHSnewhiredocuments@hhs.texas.gov • Instruct the employee to complete any additional forms required by your agency or location, such as Form HR0202, Notice of Criminal Offense Self-Reporting Requirement for Employees. **Note**: *This form applies to all program areas of HHSC and DSHS that require pre-employment criminal background checks.* • Provide the employee with the Employee Misconduct Registry Information Sheet if the employee: o works at a state supported living center or state hospital; o provides personal care services, active treatment, or other personal services to a facility consumer; and o is not professionally licensed. **Note:** *Obtain the Employee Misconduct Registry Information Sheet from agency or location support personnel (e.g., HR Hiring Specialists).* • Collect forms from the employee once they have been completed, as required. • If your employee completed the following forms (BRP Form-HR0705 or Prior State Service Employment Form- HR0112), FAX them to the Service Center at 1-866-245- 4832. • Instruct the employee to update his or her information in ERS.	• Agency or location support personnel • HHS HR	☐

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4.	Transfer tagged and inventory assets	• Transfer the tagged and inventoried assets (i.e., computer equipment) assigned to the new employee by completing the asset management form HHS-AM01 within 3 business days of the employee's arrival and routing it as directed on the form. *Please direct any questions regarding this process to your agency Asset Management Office (state office employees), Regional Inventory Coordinator (regional employees), or Property Coordinator (state supported living centers or state hospitals).*		☐

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