

Manager Onboarding for *Intra-Agency (Internal Movement) Promotions, Demotions, and Lateral Transfers

Step	Activity	Description	Go here for help...	Status
[Before the First Day]				
1.	Set applicant as "Ready to Hire" in the Hiring Center	<ul style="list-style-type: none"> Work with the Service Center recruiter to ensure that all due diligence and recruitment activities have been completed. 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. 	<ul style="list-style-type: none"> Service Center (1-888-894-4747) Hiring Center User Guide 	<input type="checkbox"/>
2	Instruct employee to bring proof of veteran status on 1st day (optional)	<ul style="list-style-type: none"> If not already provided, 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	<input type="checkbox"/>
3.	Submit service request to the Help Desk to activate Telecom services	<ul style="list-style-type: none"> 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). 	<ul style="list-style-type: none"> Consolidated Help Desk 512-438-4720 855-435-7181 Help Desk HHS Connection (texas.gov) 	<input type="checkbox"/>
[First Day Steps]				
1.	Instruct Employee to click the New Employees! link on the CAPPS login page	Instruct new employee to click on the New Employees! link on the Centralized Accounting and Payroll/Personnel System (CAPPS) login page and review the checklist. Note: <i>Employee ID is not needed to access this page.</i>	New Employee's Checklist	<input type="checkbox"/>
2.	Collect and transmit Veteran Documentation (optional)	<p>If applicable, collect the employee's DD214 and send the form to HHS HR using one of the methods below:</p> <ol style="list-style-type: none"> Mail hard copy form to HHS HR Records Management Unit, 4601 W. Guadalupe St., MC-1530, Austin, TX 78751, and mark CONFIDENTIAL. Fax record to the appropriate number below, with a coversheet addressed to the HR Records Management Unit: <ul style="list-style-type: none"> HHSC: 512-206-3952 DSHS: 512-206-3953 Scan and send an email message with the completed form to your agency mailbox listed below: <ul style="list-style-type: none"> HHSC: HHSCnewhiredocuments@hhs.texas.gov DSHS: DSHSnewhiredocuments@hhs.texas.gov 	HHS HR Veteran/Military Liaison	<input type="checkbox"/>
3.	Collect the completed Benefits Election Form and Dependent Child	<ul style="list-style-type: none"> If the transfer is within the same agency but relocates to another city/area of the state, that relocation could create a need to change Health insurance (only) provider (i.e., the employee is not eligible to add/drop dependents or make any other insurance changes.) If a change in provider is needed, the employee may update ERS On-Line or fill out the Benefits 	Service Center (1-888-894-4747)	<input type="checkbox"/>

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	Certification Form from the employee	<p>Election Form and Dependent Child Certification Form (if applicable), and email the forms to hhservicecenter.bef@ngahrhosting.com or fax to the Service Center at 866-245-3659.</p> <ul style="list-style-type: none"> Request a copy of the completed Benefits Election Form and Dependent Child Certification Form, then send the employee's Benefits Election Form and Dependent Child Certification Form (if applicable) to HHS HR using one of the methods below: <ol style="list-style-type: none"> Mail hard copy forms to HHS HR Records Management Unit, 4601 W. Guadalupe St., MC-1530, Austin, TX 78751, and mark CONFIDENTIAL. Fax records to the appropriate number below, with a coversheet addressed to the HR Records Management Unit: <ul style="list-style-type: none"> HHSC: 512-206-3952 DSHS: 512-206-3953 Scan and send an email message with the completed forms to your agency mailbox listed below: <ul style="list-style-type: none"> HHSC: HHSCnewhiredocuments@hhs.texas.gov DSHS: DSHSnewhiredocuments@hhs.texas.gov <p>The form(s) is available as part of the New Employee Checklist found in CAPPS.</p>		
4.	Collect additional New Hire Form	<ul style="list-style-type: none"> If the transfer is to a temporary position, instruct the employee to complete the HR0301, Temporary Employment Agreement. Send the HR0301 to HHS HR using one of the methods below: <ol style="list-style-type: none"> Mail hard copy form to HHS HR Records Management Unit, 4601 W. Guadalupe St., MC-1530, Austin, TX 78751, and mark CONFIDENTIAL. Fax record to the appropriate number below, with a coversheet addressed to the HR Records Management Unit: <ul style="list-style-type: none"> HHSC: 512-206-3952 DSHS: 512-206-3953 Scan and send an email message with the completed form to your agency mailbox listed below: <ul style="list-style-type: none"> HHSC: HHSCnewhiredocuments@hhs.texas.gov DSHS: DSHSnewhiredocuments@hhs.texas.gov 	<ul style="list-style-type: none"> Agency or location support personnel HHS HR 	<input type="checkbox"/>
5.	Complete new employee's personal data	<ul style="list-style-type: none"> Navigate to the Select Candidate page. <ul style="list-style-type: none"> Locate the Manager Self-Service section in the CAPPS left navigation menu. Click the New Hire link. Click Hire Candidate. 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). 	<ul style="list-style-type: none"> Manager Onboarding Process User Guide Service Center (1-888-894-4747) 	<input type="checkbox"/>

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6.	Enter the Work Eligibility Info for employee	<ul style="list-style-type: none"> Click on the Work Eligibility tab at the top of the page and verify the information. Employees who are internal agency transfers have an I-9 Form on file. 	<ul style="list-style-type: none"> Manager Onboarding Process User Guide I-9 Help Guide I-9 Form HR Policy Manual HR Guidance Handbook 	<input type="checkbox"/>
7.	Enter the employee's hire effective date	<ul style="list-style-type: none"> Click on the Job Data tab at the top of the page and enter the effective date when the employee assumes his or her position. <ul style="list-style-type: none"> Employee Movement, same agency (promotions, demotions, transfers) – Set effective date to the date the employee assumes the responsibilities of the new position. 	<ul style="list-style-type: none"> Manager Onboarding Process User Guide Service Center (1-888-894-4747) 	<input type="checkbox"/>
8.	Verify Payroll Data	<ul style="list-style-type: none"> Click on the Payroll Data tab at the top of the page Verify salary. Verify Pay Group. Note: <i>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.</i> Verify schedule. If Work Schedule needs to be updated or Intermittent Shift Differential or Shift Rate Pay needs to change, complete step #1 in Following Day Steps. 	<ul style="list-style-type: none"> Manager Onboarding Process User Guide 	<input type="checkbox"/>
9.	Save the New Hire Transaction	<ul style="list-style-type: none"> 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. The employee should retain the same Employee ID. 	<ul style="list-style-type: none"> Manager Onboarding Process User Guide Service Center (1-888-894-4747) 	<input type="checkbox"/>
10.	Request Security Role for Newly Hired Managers	For newly hired managers who will need the security access, contact agency position control.	Agency Position Control	<input type="checkbox"/>

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11.	Request Network & System Access	<p>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.</p> <ul style="list-style-type: none"> • 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. <p>To request access to various applications, emails and software, instruct employees from:</p> <ul style="list-style-type: none"> • 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. <ul style="list-style-type: none"> ○ State Hospitals to complete the DSHS Network Form (MS Word). Contact your local Facility Automation Manager for assistance with completing the form. ○ State Supported Living Centers to complete HHSC IT Form IS777 (contact your SSLC Facility Manager for directions on where to locate the form). ○ Legacy DADS [(now HHSC), all Regions <i>except Region 00</i>] employees to complete Form 4743, Access Request to Applications and Systems (PDF). ○ Legacy DSHS (now HHSC) employees to complete a DSHS Network Form (MS Word). • DSHS employees to complete a DSHS Network Form (MS Word). <p>To request access to job-related applications, direct the employee to register on the HHS Enterprise Portal.</p> <p>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.</p>	<ul style="list-style-type: none"> • 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 	<input type="checkbox"/>

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12.	Instruct employee to sign up for Multi-Factor Authentication (MFA)	<p>Instruct the employee to sign up for Multi-Factor Authentication (MFA) (Required for All Office 365 (O365) and Virtual Private Network (VPN) Users). Note: <i>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.</i></p> <ul style="list-style-type: none"> 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. 	IT Help Desk 7 a.m.-7 p.m. (CST), Mon.-Fri. 855-435-7181 512-438-4720	<input type="checkbox"/>
[Following Day Steps]				
1.	If necessary, update Work Schedule, Intermittent Shift Differential, or Shift Rate Pay	<ul style="list-style-type: none"> If Work Schedule or Intermittent Shift Differential needs to be updated, navigate to the View/Edit Time & Leave Setup page and make the update: <ul style="list-style-type: none"> Locate the Manager Self-Service section in the CAPPS left navigation menu. Click the Time and Leave Management link. Click View/Edit Time and Leave Setup. 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: <ul style="list-style-type: none"> Locate the Manager Self-Service section in the CAPPS left navigation menu. Click the Compensation Management link. Click the Maintain Shift Pay Rate. Click name of employee. 	<ul style="list-style-type: none"> Time and Leave User Guide Compensation Management User Guide 	<input type="checkbox"/>
2.	Instruct employee to login to CAPPS	<ul style="list-style-type: none"> Instruct the employee to complete all required courses that are past due or due within the next 30 days. To identify courses the employee needs to complete, login to CAPPS, locate the Manager Self-Service section in the left navigation menu. Under the Learning Center drop-down menu, select the Team Required Training Report. Select the employee, click Process Report, then View Reports. After report is processed, click View Report link. Instruct employee to complete all courses with "DEL" (delinquent) status. 	<ul style="list-style-type: none"> Internal Agency Transfer Checklist New Employee's Checklist 	<input type="checkbox"/>
		<ul style="list-style-type: none"> Instruct the employee to complete the following tasks: <ul style="list-style-type: none"> Review and verify personal information. Instruct the employee to go to the Employee Self-Service section in the CAPPS left navigation menu, select the My Profile link and select View My Personal Information from the menu option. Review and complete the required pay information. Instruct the employee to 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 links. Note: <i>The W-4 defaults to single and 0 if no entry is completed prior to payroll running.</i> 	New Employee's Checklist	<input type="checkbox"/>

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3.	Instruct employee to complete additional New Hire Forms	<ul style="list-style-type: none"> Instruct the employee to complete any additional forms required by your agency or location, such as the Form HR0202, Notice of Criminal Offense Self-Reporting Requirement for Employees. Note: <i>This applies to all program areas of HHSC and DSHS that require pre-employment criminal background checks.</i> Provide the employee with the Employee Misconduct Registry Information Sheet if the employee: <ul style="list-style-type: none"> works at a state supported living center or state hospital; provides personal care services, active treatment, or other personal services to a facility consumer; and is not professionally licensed. Note: <i>Obtain Employee Misconduct Registry Information Sheet from Agency or location support personnel (e.g., HR Hiring Specialists).</i> Collect forms from the employee once they have been completed, as required. 	<ul style="list-style-type: none"> Agency or location support personnel HHS HR 	<input type="checkbox"/>
4.	Transfer tagged and inventory assets	<ul style="list-style-type: none"> 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). 		<input type="checkbox"/>

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