Manager Onboarding for *New Hire & Rehire (not an inter or intra agency transfer) Checklist

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<tr>
<td><strong>[Before the First Day]</strong></td>
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</table>
| 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.  
• 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 | ☐ |
| **[First Day]** | | | | |
| 1. | 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 | ☐ |
| 2. | Review I-9 Form and Employment Eligibility Verification (for new hires and rehires) | • Review the documentation presented by the employee and complete the remaining 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) | ☐ |
| 3. | E-Verify processing and transmittal of I-9 documents to HHS HR for filing | • If reviewer of I-9 is not a Job Requisition Coordinator (JRCs) or Hiring Specialist:  
  o Scan and send an email message with the I-9 and List A document (if presented) to your agency mailbox listed below:  
    ▪ HHSC: HHSCnewhiredocuments@hhsc.state.tx.us  
    ▪ DSHS: DSHSnewhiredocuments@hhsc.state.tx.us  
  ▪ 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). List B and C documents (if presented) are not emailed to HR.  
  o Return List A document (if presented) to the employee.  
  • If reviewer of I-9 is a Job Requisition Coordinator (JRCs) or Hiring Specialist:  
  o Use the I-9 documents to process the E-Verify case.  
  o After case is closed, scan and send an email message with the I-9, List A document (if presented), and other documents related to the E-Verify case (if applicable) to your agency | HHS HR, Records Management | ☐ |

*New Hires or any rehires who have experienced a break in service

For assistance, contact the Service Center at: 1-888-TX-HHS-HR (1-888-894-4747)
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| 1.   | Go here for help… | mailbox listed below:  
- HHSC: HHSCnewhiredocuments@hhsc.state.tx.us  
- DSHS: DSHSnewhiredocuments@hhsc.state.tx.us  
**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). 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 |  

4. 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, 4900 N. Lamar, 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@hhsc.state.tx.us  
      - DSHS: DSHSnewhiredocuments@hhsc.state.tx.us  

5. 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 CAPPS login page and review the checklist and complete required tasks. **Note:** Employee ID is not needed to access this page. | New Employee’s Checklist |  

6. Collect the completed Benefits Election Form and Dependent Child Certification Form from the employee  
Once the employee has completed the Benefits Election Form and Dependent Child Certification Form, make a copy for the employee, then send the employee’s Benefits Election Form and Dependent Child Certification Form to HHS HR using one of the methods below:  
  1. Mail hard copy forms to HHS HR - Records Management Unit, 4900 N. Lamar, 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@hhsc.state.tx.us  
      - DSHS: DSHSnewhiredocuments@hhsc.state.tx.us  
The forms are available as part of the New Employee’s Checklist found on the CAPPS login page. | Service Center (1-888-894-4747) |  

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| 7.   | 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.  
  • 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). | • Manager Onboarding Process User Guide  
• Service Center (1-888-894-4747) | □ |
| 8.   | 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 | □ |
| 9.   | 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 agency, 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 | □ |
| 10.  | 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 | □ |
| 11.  | 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.** | • Manager Onboarding Process User Guide  
• Service Center (1-888-894-4747) | □ |
| 12.  | Request Security Role for Newly Hired Managers | For newly hired managers who will need the security access, contact agency position control. | Agency Position Control | □ |

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## Manager Onboarding for *New Hire & Rehire (not an inter or intra agency transfer) Checklist*

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### Step 13. Request Network & System Access

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| To request access to various applications, emails and software, instruct employees from:  
- HHSC (other than those listed below) to complete the [HHSC IT Form IT001](#).  
  - 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 except Region 00] 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)](#). |

To request access to job-related applications, direct the employee to register on the [HHS Enterprise Portal](#).

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### [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:  
     - 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:  
     - Click the **Compensation Management** link.  
     - Click **Maintain Shift Pay Rate**.  
     - Click name of employee. |

2. **Instruct employee to login to CAPPs**

   - Give the employee the Employee ID provided to you after completion of step #11 (First Day Steps).  
   - Instruct the employee to complete his/her training requirements within the first 30 days of employment. The employee should login to [CAPPs](#), locate the **Employee Self-Service** section in the left navigation menu, select the **My Training** link. Click the **My Learning** option from the menu. From the “My Learning” page, the employee should review and launch the following required courses:  
     - Civil Rights Training  
     - HHS Information Security/Cybersecurity Training  
   - Recommend that the employee also complete the course below. The employee should login to [CAPPs](#), locate the **Employee Self-Service** section in the left navigation menu, select the **My Training** link, then click the **Search Catalog** option in the menu. Advise the employee to enter ‘CAPPs’ in the ‘Search by keyword or City’ field. Several course options will appear. Advise the employee to select: |

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<td>o Introduction to CAPPS for HHS Employees (HHS 102)</td>
<td>New Employee’s Checklist</td>
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</table>
|      |          |  • 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 HHS-networked computers. 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 HHS network computer) link. Once the requested information is entered, a list of training courses appears. Select the appropriate link to complete each required training:  
  o Employee Time Labor and Leave  
  o Employee Safety and Security Awareness  
  o Privacy Training Including HIPAA  
  o Be the One in the Fight Against Human Trafficking  
  o Labor Account Code Training (For DSHS employees ONLY)  
  o Managing Employee Performance and Conduct Issues (ONLY for employees who are managers/supervisors)  
  • Instruct DSHS employees to complete the agency required FEMA Training (on the DSHS Train Texas website) within the first 6 months of their employment. | New Employee’s Checklist |        |
|      |          |  • Instruct the employee to complete the applicable Ethics course (either Ethics for Contracting and Procurement Personnel or Ethics for HHS Employees) on the System Training Solutions website within the first 60 days of employment. **Note:** The System Training Solutions link can only be accessed from HHS-networked computers. 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 HHS network computer) link. Once the requested information is entered, a list of training courses appears. Click on the link to the Ethics course included in the list. Note: To determine which course is required for your employee, you can also instruct the employee to navigate in CAPPS to the Employee Self-Service section in the left navigation menu, select My Training link and click the My Required Training Report menu option. | New Employee’s Checklist |        |
|      |          |  • Instruct manager/supervisory employees with direct reports (including delegates) to login to CAPPS and complete the instructor-led Job Descriptions and Audit Training (course number WRI0030) before submitting a job audit request. | New Employee’s Checklist |        |
|      |          |  • Instruct the employee to complete the following tasks:  
  o Review and verify personal information. Instruct the employee to locate the Employee Self-Service section in the CAPPS left navigation menu, click the My Profile link and select View My Personal Information from the menu options.  
  o 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. | New Employee’s Checklist |        |

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<td>3.</td>
<td>Instruct employee to complete benefits enrollment</td>
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- For employees onboarded by managers:
  - Once new hire or rehire actions are completed on-line in the portal, the Service Center Benefits Specialists are electronically (automatically) notified. Benefits Specialists will complete the actions necessary in ERS to allow a new employee to enroll in optional benefits.
  - After completion of the step above, an e-mail will be generated to notify the new employee’s supervising manager and second-line manager that the employee may now go to the ERS Online Benefits Enrollment site. A link to ERS Online is located in CAPPS under the Quick Links menu, Other ERS Links section of the page. The employee should enroll based on the selections made on the Benefits Election Form. After insurance is set up, the employee can designate beneficiaries in ERS Online as well.

**Note:** This is a critical step to ensure proper coverage and must be completed by 8 pm CT of the same day the e-mail notice is sent by the Service Center Benefit Specialist to the supervising manager and manager. The manager may contact the Service Center Benefits Specialists to indicate where the e-mail notification should be sent by e-mailing HHSServiceCenter.Benefits@ngahrhosting.com.

More detailed instructions regarding the ERS enrollment can be found in the [New Employee’s Checklist](#).

- For employees onboarded by JRCs and Hiring Specialists:
  - Instruct the employee to complete the Benefits Election Form and Dependent Child Certification.
  - Provide a copy of the completed form to the employee.
  - Give the completed form to the regional JRC or Hiring Specialist.
  - An e-mail will be generated to notify the new employee’s supervising manager and manager that the employee may now go to the ERS Online Benefits Enrollment site to elect additional benefit choices (e.g., TexFlex, beneficiary changes). A link to ERS Online is also located in CAPPS under the Quick Links menu.

**Note:** This is a critical step to ensure proper coverage and must be completed by 8 pm CT of the same day the e-mail notice is sent by the Service Center Benefit Specialist to the supervising manager and manager. The manager may contact the Service Center Benefits Specialists to indicate where the e-mail notification should be sent by e-mailing HHSServiceCenter.Benefits@ngahrhosting.com.

More detailed instructions regarding the ERS enrollment can be found in the [New Employee’s Checklist](#).

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| 4.   | Instruct employee to complete additional New Hire Forms | • Instruct the employee to complete the [HR0312, Acknowledgement by New Employees](https://hhsconnection.hhs.texas.gov/sites/intranet/files/forms/hr/hiring-separating/hr0312.doc). This form may be found at the following link: https://hhsconnection.hhs.texas.gov/sites/intranet/files/forms/hr/hiring-separating/hr0312.doc.  
• Send the [HR0312](https://hhsconnection.hhs.texas.gov/sites/intranet/files/forms/hr/hiring-separating/hr0312.doc) to HHS HR using one of the methods below:  
1. Mail hard copy form to HHS HR - Records Management Unit, 4900 N. Lamar, 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@hhsc.state.tx.us  
   • DSHS: DSHSnewhiredocuments@hhsc.state.tx.us  
• Instruct the employee to complete any additional forms required by your agency or location, such as the Self-Reporting Form – [HR0202](https://hhsconnection.hhs.texas.gov/sites/intranet/files/forms/hr/hiring-separating/hr0202.doc), for certain employees at HHSC, state supported living centers, state hospitals, or the ICF-MR component of the Rio Grande State Center.  
• Provide the employee with the Employee Misconduct Registry Information Sheet if the employee:  
  o works at a state supported living center, state hospital, or the ICF-MR component of the Rio Grande State Center;  
  o provides personal care services, active treatment, or other personal services to a facility consumer; and  
  o is not professionally licensed.  
**Note:** Obtain Employee Misconduct Registry Information Sheet from Agency or location support personnel (e.g., Job Requisition Coordinators).  
• Collect forms from the employee once they have been completed, as required.  
• If your employee completed the following forms ([BRP Form-HR0705](https://hhsconnection.hhs.texas.gov/sites/intranet/files/forms/hr/hiring-separating/hr0705.doc) or [Prior State Service Employment Form- HR0112](https://hhsconnection.hhs.texas.gov/sites/intranet/files/forms/hr/hiring-separating/hr0112.doc)), FAX them to the Service Center at 1-866-245-4832. | • Agency or location support personnel  
• HHS HR | ☐ |
| 5.   | 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](https://hhsconnection.hhs.texas.gov/sites/intranet/files/forms/hr/hiring-separating/hhs-am01.doc) within 3 business days of the employee's arrival and routing it as directed on the form. | Service Center (1-888-894-4747) | ☐ |

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