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	• 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	☐
[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:*** *Employee ID is not needed to access this page.*	New Employee's Checklist	☐
2.	Collect the completed Benefits Election Form and Dependent Child Certification Form from the employee	• 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 Election Form and Dependent Child Certification Form, and fax to the Service Center at 866-245-3659. ○ 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 form(s) is available as part of the New Employee Checklist found in CAPPS.	Service Center (1-888-894-4747)	☐
3.	Complete new employee personal data	• Navigate to the **Select Candidate** page. ○ 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).	• Manager Onboarding Process User Guide • Service Center (1-888-894-4747)	☐

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4.	Enter the Work Eligibility Info for employee	• 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.	• Manager Onboarding Process User Guide • I-9 Help Guide • I-9 Form • HR Policy Manual • HR Guidance Handbook	☐
5.	Enter the employee's hire effective date	• 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. ○ Employee Movement, same agency (promotions, demotions, transfers) – Set effective date to the date the employee assumes the responsibilities of the new position.	• Manager Onboarding Process User Guide • Service Center (1-888-894-4747)	☐
6.	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.* • 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.	• Manager Onboarding Process User Guide	☐
7.	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. • The employee should retain the same Employee ID.	• Manager Onboarding Process User Guide • Service Center (1-888-894-4747)	☐
8.	Request Security Role for Newly Hired Managers	For newly hired managers who will need the security access, contact agency position control.	Agency Position Control	☐
9.	Request Network & System Access	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).	• Network & System Access • State Hospitals - contact your Facility Automation Manager • State Supported	☐

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		○ 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.	Living Centers - contact your site Facility Manager • DSHS Online, Information Technology Section	
[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: ○ 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: ○ 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.	• Time and Leave User Guide • Compensation Management User Guide	☐
2.	Instruct employee to login to CAPPS	• 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.	• Internal Agency Transfer Checklist • New Employee's Checklist	☐
		• Instruct the employee to complete the following tasks: ○ 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:*** *The W-4 defaults to single and 0 if no entry is completed prior to payroll running.*	New Employee's Checklist	☐
3.	Instruct employee to complete additional New Hire Forms	• Instruct the employee to complete any additional forms required by your agency or location, such as the Self-Reporting Form – HR0202, 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: ○ works at a state supported living center, state hospital, or the ICF-MR component of the Rio	• Agency or location support personnel • HHS HR	

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		Grande State Center; ○ provides personal care services, active treatment, or other personal services to a facility consumer; and ○ 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.		
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, state hospitals and the ICF-MR component of the Rio Grande State Center).		☐

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