

CAPPS Desk Aid

Onboarding New Employees

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

TABLE OF CONTENTS

Overview	1
Navigating to the OnBoarding Module	1
Administrator Access.....	1
Employee Access	2
Configurations and Setup	2
Preboarding	3
Preboarding Documentation	3
Preboarding Delivered to Applicants	4
Post (Candidate Gateway)	4
Email Applicant	7
Managing the OnBoarding Processes	8
Employee Documents	8
Manage OnBoarding Event	9
OnBoarding Status.....	10
Onboarding Process for Employees	11
Process Steps.....	11
Informational or Instructional Pages	12
Data Entry Page	12
Download and Upload Page	13
Download and Acknowledge Page	13
Summary Page	13
Revision History	14

Onboarding New Employees

Overview

This desk aid guides users through accessing, creating and managing the CAPPS processes for onboarding new employees. The multiagency usage template that includes common statewide new employee forms offers the following benefits:

- Access to documents downloads, updates, uploads and acknowledgments.
- Usability for tracking documents.

Although the OnBoarding module is optional for new employees, it allows new employees to expedite the employment process and helps administrators meet agency requirements for new hires. Additional offerings:

- Fluid dashboards, pages and insights for reporting.
- Integration within CAPPS HR/Payroll and the *Employee Self Service* dashboard.
- Access to standard HR/Payroll forms, including the option to store and maintain forms.
- Ability to send standard email notifications (initial, reminders, overdue) for employees and administrators.

Navigating to the OnBoarding Module

Administrator Access

Onboarding administrators can access the following sections through the *Workforce Administration* dashboard:

- *Employee Documents*
- *Manage OnBoarding Event*
- *OnBoarding Status*

Navigation

Dashboard: Workforce Administration; **Tile:** Manage Human Resources; HR Administration; OnBoarding

The screenshot displays the 'HR Administration' interface. On the left, a sidebar menu includes 'OnBoarding' (highlighted with a red box), 'Employee Documents', 'Manage OnBoarding Event', and 'OnBoarding Status'. The main content area is titled 'Manage OnBoarding Event' and features a 'Find an Existing Value' section. This section includes a 'Search Criteria' dropdown and a 'Recent Searches' list. Below these are various search fields with 'begins with' dropdowns: Employee ID, Name, Second Last Name, Middle Name, Business Unit, Department, Employee Record, Last Name, Alternate Character Name, Organizational Relationship, Department Set ID, and Company. A 'Search' button is located at the bottom of the search criteria section.

Employee Access

Navigation

Dashboard: Employee Self-Service; **Tile:** OnBoarding; OnBoarding Activities

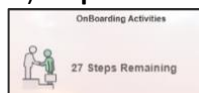
1. Select the **OnBoarding** tile.

2. Select **Get Started**.



—or—

Select ## (number of) **Steps Remaining**.



Note: The *Steps Remaining* option is only available when the employee completes one or more steps.

After making the selection, the *CAPPS OnBoarding_Statewide* (process) page displays.

 A screenshot of the "CAPPS OnBoarding_Statewide_v1" process page. The page has a light blue header with a user profile icon and the name "Director VI". Below the header is a sidebar with a list of tasks, each with a status indicator (a green dot for "Visited" and a grey dot for "Not Started"). The tasks listed are: "Welcome to the Agency" (Visited), "Instructions - New Employee Forms" (Not Started), "Employee Confidential Information Agreement" (Not Started), "Emergency Data Sheet" (Not Started), "Direct Deposit form" (Not Started), "W4 Tax Withholding" (Not Started), "Automatic 401K Enrollment" (Not Started), "Benefits Election Form" (Not Started), and "State Building Electronic Access Card" (Not Started). The main content area on the right contains a "Welcome!" message, a paragraph about the onboarding process, and a note about the time sensitivity of the tasks.

Configurations and Setup

The OnBoarding module is configured for the multiagency usage template, statewide forms and common benefit documents. These documents and forms are stored within CAPPS HR and maintained by the CAPPS Recruit team:

- *Direct Deposit Authorization*
- *Form W-4*
- *Automatic 401(k) Enrollment* (PDF)
- *DPS Parking Application* (PDF)
- *State Building Electronic Access Card (CP-6) Form* (PDF)
- *Employee Emergency Data* (PDF)
- *Careworks – Employee Notification of Network Requirements (acknowledgment) Form* (PDF)
- *Careworks – Employee Notification of Network Requirements (packet)* (PDF)
- *ERS – Benefits Election Form* (PDF)
- *ERS – Dependent Child Certification Form* (PDF)
- *ERS – GBP Supplemental Information Form* (PDF)
- *ERS – Notice of Privacy Practices (HIPAA) Form* (PDF)
- *ERS – Notice of Privacy Practices (HIPAA) Acknowledgment* (PDF)
- *ERS – Tobacco Use Certification Form* (PDF)
- *ERS – TexaSaver Get Started* (PDF)
- *ERS – TexFlex Authentication to Release Personal Info Form* (PDF)
- *ERS – TexFlex Dependent Care FSA* (PDF)
- *ERS – TexFlex Enrollment_Change Form* (PDF)
- *ERS – TexFlex Flex Spending Accounts* (PDF)

Note: The *Direct Deposit Authorization* form and *Form W-4* routes the new employee to the applicable page within *CAPPS Employee Self Service*.

Preboarding

Preboarding Documentation

The Preboarding process assists agencies requiring standard and/or agency-specific documentation before the employee's hire date. The CAPPS Recruit team can provide recommendations and guidance to agencies that require preboarding documentation.

Agencies can also manage the Preboarding process without using the OnBoarding module:

1. Agency determines the applicable documents required for preboarding.
2. Agency specifies the list of required pre-employment documents.
3. Recruiting user attaches the required documents during the *Prepare for Offer* step.
4. Applicant accesses and completes the required documents.
5. Recruiting users will:
 - View and download the completed documents saved by the applicant.
 - Export and save the completed documents outside CAPPS, as applicable.
 - Verify the applicant's contact information:
 - Registered Online (value of *Yes*)
 - Preferred Contact (value of *Email*)
 - Notify Applicant (value of *Enabled*)
 - Select the ACTION REQUIRED checkbox for preboarding attachments.

Prepare Job Offer

Offer Details

Job Opening: 100021
 *Position Number: [Search]
 Job Code: 1573
 *Future Job Code: 1573
 *Future Salary Administration Plan: B
 *Future Salary Grade: 20
 Future Salary Step: [Search]
 *Hiring Manager: [Search]
 *Recruiter: [Search]
 Status: 010 Extend
 Reason: [Search]
 Created By: [Search]

Business Unit: [Search]
 Offer Date: 03/03/2026
 *Start Date: 03/10/2026
 *Offer Expiration Date: 03/10/2026
 Applicant Type: External Applicant
 Registered Online: Yes
 Preferred Contact: Email
☒ Notify Applicant
[Personal Data Required for Preboarding](#)

Job Offer Components

Component	Offer Amount	Payment Mode	Currency	Frequency	Pay Group
Base Salary	[Search]	Cash	USD	Monthly	MON

Comments

Offer Letter

Offer Letter OF1
 Generate Letter Upload Letter Email Applicant

Attachments

Type	Description	Details	Action Required
Attachment	Sample - Job offer Letter	Test_HRS_OFF_LET.pdf	☐
Attachment	Sample Preboarding Document	Preboarding_POC.docx	☒

Add Applicant Attachment Add Organizational Attachment

Preboarding Delivered to Applicants

Preboarding documents can be sent to applicants by either:

- **Post** – Routes the pre-boarding documents to Candidate Gateway (preferred path) where all notifications and documents remain within CAPPS.
- **Email Applicant** – Routes document to the applicant's email address, which results in all notifications and documents remaining outside CAPPS.

Post (Candidate Gateway)

On the *Prepare Job Offer* page, the recruiting user will:

1. Select **Post**.
The *Post Online Job Offer* page displays.
2. Review all sections and attachments.
3. Select **Submit** if the information is correct.
–or–
Select **Cancel** to make changes.

Candidate Gateway routes the preboarding documents and sends the applicant a notification with access instructions.

SAMPLE NOTIFICATION
Dear <Applicant>, Congratulations! We are delighted to extend to you an offer of employment for the position. Job Opening ID: 100142 Financial Analyst II The details of your job offer can be viewed by selecting the link. This job offer will expire on 20XX-XX-XX. DIRECTIONS: 1. Select the below link to access our careers site. 2. Sign In to access your account using your User Name and Password. 3. View your notifications. 4. In the notifications list select the 'Job Offer' link. 5. Review the offer details and follow the instructions to accept or reject the job offer. https://erphcmomsonsbx.cpa.texas.gov/psp/pshcmsonsbx2/EMPLOYEE/HRMS/c/HRS_HRAM.HRS_APP_SCHJOB.GBL?Page=HRS_APP_SCHJOB&Action=U&FOCUS=Applicant Thank you.

Viewing Preboarding Documents

After receiving an email from CAPPS Recruit, an applicant can begin the onboarding process. The email attachment includes instructions and links.

SAMPLE EMAIL		
CAPPS Recruiting – New Employee Orientation		
Dear {Applicant Name},		
Job Opening: {Job Opening ID} {Agency Acronym} – {Job Opening Title}		
Document Due Date: {Offer Expire Date} Document Count: 5		
Please access each of the documents listed below and complete them as part of your New Employee Orientation requirements, and then save the completed form to your PC as a .PDF file (e.g. sometimes you will have to use the Print feature in your browser to create a .PDF file), and then upload each of the completed .PDF forms to your application for this position by the Due Date shown above:		
Preboarding Document Name	Instructions	Hyperlink
USCIS I9 form	Use the hyperlink to access the form, and complete the document, and save it to your PC as a .PDF, and then upload it to your application.	https://www.uscis.gov/sites/default/files/document/forms/i-9.pdf
Form I-9 Instructions	For reference purposes when completing the I9. Do not upload this to your application.	https://www.uscis.gov/sites/default/files/document/forms/i-9instr.pdf
IRS W-4 form	Use the hyperlink to access the form, and complete the document, and save it to your PC as a .PDF, and then upload it to your application.	https://www.irs.gov/pub/irs-pdf/fw4.pdf
CAPPS - Employee Confidential Information Agreement (CTIA)	Use the hyperlink to access the form, and complete the document, and save it to your PC as a .PDF, and then upload it to your application.	https://comptroller.texas.gov/forms/70-223.pdf

To view the job offer letter and complete the preboarding documents, the applicant will:

1. Log into **Candidate Gateway**.

The *My Job Notifications* page displays.

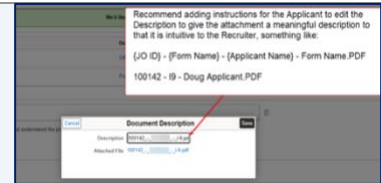
My Job Notifications					
My Job Offers					
Job Title	Job ID	Status	Location	Offer Date	Expiration Date
Financial Analyst II	100142	New	Austin Dallas Fort Worth	10/01/2025	10/03/2025
My Notifications					
Subject	Status	Date Received			
You have a job offer: Financial Analyst II (Job ID 100142)	New	10/02/2025 9:16AM			
You are invited to apply for a job: Financial Analyst II (Job ID 100142)	New	10/01/2025 10:34AM			
You have a Registration Confirmation notification	New	07/17/2025 12:10PM			

2. Select the job offer notification.
The *Job Offer* page displays.

3. Follow the instructions (including downloading the pre-boarding documents to a local device for completion).
4. Select **Add Document** to upload completed documents.
(Candidate Gateway uploads the preboarding documents to the *Attachments* section on the applicant's application.)

Note: We recommend providing the applicant with instructions for using a standard naming convention when uploading completed documents.

The file name displays for recruiting users.



5. Select **Send to Recruiter**.

Email Applicant

To send email correspondence to an applicant:

1. Navigate to the *Prepare Job Offer* page.
2. Select **Email Applicant**.

The *Send Correspondence* page displays.

The screenshot shows the 'Send Correspondence' form with the following sections:

- Recipients:** A table with columns ID, Applicant Name, and Job Opening. It shows one entry with ID 10082 and 'No Job Opening Selected'.
- Message Type and Method:** Two dropdown menus for 'Contact Method' (set to Email) and 'Letter'.
- Recipient Information:** Fields for To, Cc, and Bcc, each with a 'Find' button. There is also a checkbox for 'Include Interested Parties'.
- Sender Information:** A 'From' field.
- Message:** Fields for *Subject (Preboarding Activities), *Access (Public), and *Message (a text area with a placeholder message about reviewing the Offer Letter and Preboarding Forms).
- Attachments:** A table with columns File Name, Description, and an icon column. It lists 'Preboarding_POC.docx' and '2025-10-01-13 32 12 0000001...' with descriptions 'Preboarding Forms' and 'Offer Letter' respectively. There is an 'Add Attachment' button below.

At the bottom are buttons for 'Preview', 'Send', and 'Cancel'.

3. Complete all the required fields in the *Message* section:

- SUBJECT
- ACCESS
- MESSAGE (body/content)

4. Select **Preview**.

The *Applicant Recruitment* page displays.

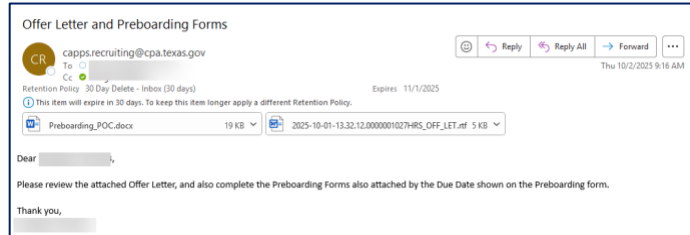
The screenshot shows the 'Applicant Recruitment' page with the 'Send Correspondence Preview' section. It displays the filled-in fields from the previous form:

- To:** [Redacted]
- Cc:** [Redacted]
- Bcc:** [Redacted]
- From:** [Redacted]
- Subject:** Offer Letter and Preboarding Forms
- Message:** A preview of the email body, starting with 'Dear [Redacted],', followed by the instruction to review the Offer Letter and Preboarding Forms, and ending with 'Thank you.'

A 'Return' button is located at the bottom left.

5. Review the email.
6. Select **Return**.
7. Select **Send**.

The applicant receives the email notification with the pre-boarding documents.



Managing the OnBoarding Processes

HR administrators can manage the OnBoarding processes using these menus:

- Employee Documents
- Manage OnBoarding Event
- OnBoarding Status

Employee Documents

The HR administrator accesses the completed onboarding documents on the *Employee Documents* page.

HR administrators will:

1. Use the **Search** (magnifying glass) on the *Employee Documents* page to find documents saved by the employee ID (EMPL ID).
2. View the employee's completed documents, even if the employee did not mark the step as *Completed*.

- Download all completed documents in the employee's personnel folder (as of the completion of the onboarding process).

Notes: CAPPS accepts all common file types with no file size limitations. If corrections are necessary, employees can upload a new document.

The screenshot shows the 'Employee Documents' search page in the CAPPS system. The left sidebar has 'Employee Documents' selected. The main content area is titled 'Employee Documents' and 'Find an Existing Value'. It includes a 'Search Criteria' section with a prompt to enter information. Below this are 'Recent Searches' and 'Saved Searches' dropdowns. The search form contains fields for 'Empl ID', 'Name', 'Second Last Name', 'Middle Name', 'Business Unit', 'Department', 'Template Category', 'Empl Record', 'Last Name', 'Alternate Character Name', 'Organizational Relationship', 'Department Set ID', and 'Company'. Each field has a 'begins with' dropdown and a search icon. There are also 'Show fewer options' and 'Case Sensitive' checkboxes, and 'Search' and 'Clear' buttons at the bottom.

Manage OnBoarding Event

The administrator validates the status of the employees' onboarding process before executing an OnBoarding Event (*Active OnBoarding Process*). The *Manage OnBoarding Event page* is used only when the administrator needs to restart or manually delete the onboarding process.

CAPPS sends the employee an email notification for both events. In addition, onboarding administrators receive an email about the completed processes.

Notes: Each agency determines if a new onboarding process is required for employees who are promoted or for other types of hires that use the *Action Reason Code* **010** (new hire) or **012** (rehire).

Example: The employee was promoted and all the onboarding documents are required. The administrator can delete the event or mark the documents as completed.

CAPPS manages the beginning and end of onboarding processes for newly hired and terminated employees. If an employee does not complete their onboarding process, the system deletes it on the employee's termination date.

To execute either onboarding event:

- Access the *Manage OnBoarding Event* page.
- Enter the employee's search criteria.
We recommend searching for the employee using the Employee ID (EMPL ID) field.

3. Select **Add a New Value** to view the search results.

HR Administration

Manage OnBoarding Event

Find an Existing Value

Add a New Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches

Saved Searches Choose from saved searches

Employee ID: begins with []

Name: begins with []

Second Last Name: begins with []

Middle Name: begins with []

Business Unit: begins with []

Department: begins with []

Employee Record: []

Last Name: begins with []

Alternate Character Name: begins with []

Organizational Relationship: []

Department Set ID: begins with []

Company: begins with []

☐ Case Sensitive

Search **Clear**

4. Select **Save** to start the onboarding process.

Manage OnBoarding Event

Template Assignment

Employee ID: []

Employee Record: []

Template: CAPPS01 CAPPS OnBoarding_Statewide_v1

Delete **Save**

Notify **Add** **Update/Display**

—or—

Select **Delete** to cancel the onboarding process.

OnBoarding Status

There are four onboarding statuses:

- Canceled
- Completed
- In Progress
- Not Started

OnBoarding Status

View OnBoarding Status

2 results found

Employee ID %	Employee Record %	Name %	Last Name %	First Name %	Middle Name %	Second Last Name %	Alternate Character Name %	Status %	Event Date %	Onboarding Process Start Date %
[]	[]	[]	[]	[]	[]	[]	[]	Not Started	03/20/2025	
[]	[]	[]	[]	[]	[]	[]	[]	Not Started	03/20/2025	

Note: We recommend opening the **STATUS** drop-down menu for searching.

Onboarding Process for Employees

Note: Agency users will be trained on the following processes:

- **Immediate action:** Agency administrators must verify the employee's business email account is set up and the employee is trained on how to access and use it (since the employee must immediately navigate to the onboarding section to begin the onboarding process).
- **Email trigger:** Once the employee begins the onboarding process, it triggers sending the onboarding email notification to the employee and agency admin users.

Navigation

Dashboard: Employee Self Service; **Tile:** OnBoarding

The OnBoarding tasks display in a preferred order of completion, but the onboarding process is configured nonsequentially, so employees can complete agency-specific documents in any order.

OnBoarding tasks:

- Welcome to the Agency
- Instructions – New Employee Forms
- Employee Confidential Information Agreement
- Emergency Data Sheet
- Direct Deposit form
- W-4_Tax Withholding
- Automatic 401k Enrollment
- Benefits Election Form
- State Building Electronic Access Card

As the employee completes each task, the system records the employee's actions. Specific icons display indicating:

- Not Started (open circle outline)
- Visited (solid green circle)
- Complete (green checkmark)
- Required (red asterisk)

Note: CAPPS OnBoarding is not configured for a required step.

Process Steps

The onboarding process is comprised of multiple steps or actions and includes several informational-pages:

- Informational or Instructional
- Data Entry (Employee Self Service)
- Download and Upload
- Download and Acknowledge
- Summary

Informational or Instructional Pages

These pages provide general information or instructions for completing documents; they are read-only and require no action.

When the employee begins the onboarding process, the system-generated *Welcome to the Agency* page displays.

Data Entry Page

The onboarding process integrates with Human Resources (HR) functionality, allowing employees to enter personal data for:

- Direct Deposit Authorization

- W-4 Withholding Certificate (Form W-4).

Note: CAPPS HR/Payroll users can view employee data using navigation paths within the HR or Payroll modules.

Download and Upload Page

The majority of the onboarding steps are configured for employees to:

- Download documents
- Complete documents
- Upload documents

Dependent Child Certification Form

Step 1 - Download Documents

Please download the following listed documents. Those documents requiring updates can be uploaded in the Required Documents to Acknowledge / Upload table.

Document / Description	File Name	Action
TX_ERS_Dependent Child Certification Form	ERS_-_Dependent_Child_Certification_Form.pdf	Download
ERS_Dependent Child Certification Form		

Step 2 - Acknowledge / Upload Required Documents

You must acknowledge or upload the listed documents.

Document / Description	File Name / Attached On	Action
TX_ERS_Dependent Child Certification Form		Upload
ERS_Dependent Child Certification Form		

Download and Acknowledge Page

Some of the onboarding steps require employees to download and acknowledge documents. After downloading the document to a device, the employee reads the document and selects **Acknowledge**. The system timestamps the employee's acknowledgment.

TexaSaver Get Started

Step 1 - Download Documents

Please download the following listed documents. Those documents requiring updates can be uploaded in the Required Documents to Acknowledge / Upload table.

Document / Description	File Name	Action
TexaSaver Get Started	ERS_-_Texa_saver_Get_Started.pdf	Download
TexaSaver Get Started		

Step 2 - Acknowledge / Upload Required Documents

You must acknowledge or upload the listed documents.

Document / Description	File Name / Attached On	Action
TexaSaver Get Started	ERS_-_Texa_saver_Get_Started.pdf	Acknowledge
TexaSaver Get Started		

Summary Page

The *Summary* page provides the employee with an overview of the onboarding process, and the employee must complete all steps to complete the onboarding process. Features include:

- The status of each step
- Navigation to access specific steps
- A Mark Complete feature

CAPPS OnBoarding_Statewide_v1

Director VI

[Mark Complete](#) [Previous](#)

Summary

Please review all the tasks and complete all the assigned tasks. Once all the assigned tasks have been completed, please select the "Mark Completed" button to finish the OnBoarding Process.

Note: The OnBoarding tile and dashboard will close, once you complete the entire process.

Thank you, and welcome to our agency.

Steps

Step	Status	Mark Complete	Go to Step
Welcome to the Agency	Visited	Mark Complete	Go to Step
Instructions - New Employee Forms	Not Started	Mark Complete	Go to Step
Employee Confidential Information Agreement	Not Started	Mark Complete	Go to Step
Emergency Data Sheet	Not Started	Mark Complete	Go to Step
Direct Deposit form	Not Started	Mark Complete	Go to Step
W4_Tax Withholding	Not Started	Mark Complete	Go to Step
Automatic 401K Enrollment	Not Started	Mark Complete	Go to Step
Benefits Election Form	Not Started	Mark Complete	Go to Step
State Building Electronic Access Card	Not Started	Mark Complete	Go to Step
State Building Parking Application	Not Started	Mark Complete	Go to Step
Instructions - Benefits Forms	Not Started	Mark Complete	Go to Step
Access My Account TexFlex Spending Account	Not Started	Mark Complete	Go to Step
Access My Account Contact TexFlex Brochure	Not Started	Mark Complete	Go to Step
TexaSaver Get Started	Not Started	Mark Complete	Go to Step
TexFlex Dependent Care FSA	Not Started	Mark Complete	Go to Step
Notice of Privacy Practices (HIPAA) Form	Not Started	Mark Complete	Go to Step

Revision History

Date	Description of Change	Changed By
Aug. 10, 2026	Initial release.	S. Keltgen