

Procedural Guidance for On-Boarding Appointees in State Agencies

Action Step	Initiated By	Guidance
Appointment Notification	Governor's Office	<ul style="list-style-type: none"> • Letter received from the Governor's Chief of Staff advising of appointment to the agency – usually directed to the HR Director
Position Creation	Agency HRD	<ul style="list-style-type: none"> • If a vacant position is not currently available, create a position in Cardinal (or PMIS for Release 2) • To ensure consistency across agencies please use the critical data elements listed below • Funding for the position is typically absorbed within the Agency's budget
Position Description	Governor's Office	<ul style="list-style-type: none"> • May be determined by the Cabinet Secretary • Be prepared to work with the Agency Head to develop a work plan
On-Boarding Process	Agency HRD	<ul style="list-style-type: none"> • Review the Handbook for At Will Employees and the Executive Leave program. (Note: this document is subject to change with a new administration) • Facilitate the completion of employment on-boarding documents to include but not limited to: <ul style="list-style-type: none"> • State and Federal Tax Withholding Forms • I-9 Form and E-Verify • Emergency Contact • Selection of VRS Plan – ORPPA or VRS (check with the VRS if the individual has prior state/local service) • Health Insurance Enrollment • Life Insurance and Optional Life • State Employee Badge/Parking • Policy Reviews and respective receipts (such as Handbook for At Will Employees, DHRM Policies 1.05, 1.75 and 2.35) • State and Agency required training (Required Training for 2022) • Provide an updated agency organizational chart, staff directory, mission statement, strategic plan, program information, and workforce demographics • Process criminal background check as required for your agency • Inform Agency Head of Statement of Economic Interests requirements and training • Facilitate introductions and a tour of the facility, explain Agency procedures and policies and send a welcome announcement/introduction to all staff • Key record into Cardinal or PMIS and create/maintain a personnel record • Within six months of employment, Agency Heads should participate in the Agency Head training as provided on DHRM's website

		For Appointees reappointed to another agency or for those Appointees transferring from a salaried position, follow the Cardinal Guidance on the PMIS/R1 separation and rehire process. Seek assistance as needed from DHRM or Cardinal PPS for transfers from classified or other appointee positions to retain state begin date for instances when there is no break in service.
Link to Executive Resources on DHRM’s website		

PMIS Critical Data Elements

Please ensure the At Will positions include the following data in the listed data elements

Data Element	Entries
Position Number	00001
Role Classification	<ul style="list-style-type: none"> • Agency Head - 00+Agency Number • Chief Deputy – 91221 • Confidential/Policy Assistant - 91222
At Will	Enter “Y”
Economic Interests	Enter “Y”
Level	Enter “M” for Agency Head Enter “A” or Chief Deputy or Confidential/Policy Asst.
Card Dept	Enter the Cardinal Department Number (Consult with Agency Finance/Budget)
Card Approvr	Enter HRD Position Number for Agency Head and the respective position number of the appropriate agency supervisors for Chief Deputy and Confidential/Policy Assistant
Position Grade	00
OT/Exempt	Enter “E”
Card Emp Group	<ul style="list-style-type: none"> • Agency Head - Enter AHD • Chief Deputy – Enter OTO • Confidential/Policy Assistant – Enter OTO
Card Leave Plan	Enter “C” for At Will Executive Leave Enter “A” if approved by the Chief of Staff to remain in the Classified Leave Plan (only for Appointees moving from classified positions with no break in service)

Cardinal Critical Data Elements

Please ensure the At Will Positions include the following data criteria in the referenced data elements

Empl Class	Use the Pull Down Menu to select Agency Head Othr Official (for Deputy Chief and Confidential/Policy Assistant)
Eligibility Group (Absence Mngmt)	Enter: ExecElgGrp for Executive Eligibility Group
Absence System (Absence Mngmt)	Enter: Absence Management System if the Appointee wishes to track their leave in Cardinal.