State of Wisconsin
Department of Military Affairs
State Human Resources Office
DMA-3101 (R.9/2024)

Off-Boarding, Recruiting, and New Hire Process Checklist

Instructions: This checklist is to be used as guidance to outline the State Human Resources (SHR) process beginning with an employee leaving their position, recruiting and filling the vacancy, and onboarding the new incumbent. If you have any questions about the checklist, please reach out to DMASHR@widma.gov.

WHO	WHEN	✓	NOTICE OF EMPLOYEE DEPARTURE
Employee	At least 14 calendar days prior to resignation effective date		• After discussion with Payroll & Benefits Specialist regarding last day considerations, employee submits Resignation/Retirement Notice form to the supervisor. Employee may supplement the form with a formal letter if desired. • Verify the mailing address is current in PeopleSoft to ensure delivery of future communications. • Create an out of office notification in email to begin on the last day in office.
Supervisor	As soon as possible after receipt of resignation, and prior to employee's last day		• Sign acknowledgement portion of Resignation/Retirement Notice form and send to DMAPayroll@widma.gov (include formal resignation letter if employee submitted one). Supervisor may supplement the form with a formal letter of acknowledgement, if desired. • If employee has a state issued cell phone, ensure all voicemails were forwarded to Outlook. Once phone is returned to IT, all data will be erased. • Review the employee's records to ensure all official records are accounted for and non-records such as duplicates, working notes, and drafts are being destroyed appropriately. • Ensure employee has submitted any outstanding travel expense vouchers to ensure payment is made on their last paycheck. • Ensure employee has reconciled all outstanding purchasing card statements.
Payroll	Prior to employee's last day in the office		• Verify information on the Resignation/Retirement Notice form and sign acknowledgement portion. • Email completed form to the employee and cc: the supervisor and the DMA State Human Resources (SHR) distribution list. • The email also contains the link to the DMA Employee Exit Survey with the option to schedule an exit interview with SHR staff. • Prepare resignation/retirement/transfer benefits letter and COBRA documents. Review absence balances, leave payout, Sick Leave Certification (if applicable). • Process final paycheck audit and STAR/PeopleSoft transactions. • Complete the necessary PeopleSoft transaction for the employee separation.
HR Assistant	Prior to employee's last day in the office		• Save the completed Resignation/Retirement Notice form to the employee's personnel file in PeopleSoft. • Add the vacancy information to the SHR Vacancy Report. • Update the organizational chart. • Enter the Employee Separation service request into the IT Ticketing System. • Notify SBF, PMO, J6, and CFMO (when applicable) of the employee departure and effective date. • Distribute retirement gifts and Governor's certificate if necessary.
Supervisor	Employee's last workday		• Confirm with the Provost Marshal Office (PMO) at DMASSID@widma.gov to ensure the access card will be disabled. • Collect employee's ID/access card/fob and return to Provost Marshal Office (PMO) or on-site security staff. • Collect CAC card and return to on-site DEERS/RAPIDs Office (Defense Enrollment Eligibility Reporting System/Real-Time Automated Personal Identification System), if applicable. • Collect DBIDS (Defense Biometric IDentification System) card and return to on-site security staff, if applicable.

			• Collect state or federal equipment (e.g., IT equipment, MiFi, monitors, ergonomic equipment, phone, keys, purchasing card, DMA credentials, personally assigned vehicle and keys, etc.). • Check workstation for personal items. • Ensure specialty accesses have been disabled. • Identify any special program/software access that needs to be deactivated (e.g., PeopleSoft Core User, GIS, Adobe Pro, Visio, AutoCAD, etc.) and notify appropriate authority of departure effective date. • Create IT ticket if email forwarding or access to employee email account is necessary. • Confirm that employee has created an out of office notification by sending them a test email. • Ensure all earlier steps have been completed.
Provost Marshal Office (PMO)	On or before employee's last workday		• Create entry in OnGuard to disable ID/access card or fob to be effective at end of last day (11:59pm) that employee will be in the office. • Log departure information.
State IT	On or before employee's last workday		• Create entry to disable all IT access to be effective at end of last day (11:59pm) that employee will be in the office. • Forward departing staff email or grant access to supervisor, if requested.
WHO	**WHEN**	✓	**REQUEST TO STAFF PROCESS** (former PAR process)
Supervisor	As soon as decision is made on how vacant position will be utilized		• Review and update position description (PD). Draft the necessary exclusion forms (e.g., Supervisor, Management, Confidential) as well as the PD cover sheet. Consult with assigned HR representative if needed. • Email the PD, cover sheet, and necessary exclusion forms to DMASHR@widma.gov. • Submit the Request to Staff (RTS) in PeopleSoft to obtain necessary approvals.
HR Assistant Adv	Once the PAR/RTS and PD arrive in SHR		• Log the RTS in the SHR Vacancy Report. • Create the recruitment file and save PD, cover sheet, exclusion forms to the folder. • Notify the HR Specialist that the recruitment file has been created.
WHO	**WHEN**		**RECRUITMENT PROCESS** (The timeline for filling a classified vacancy is 60 days)
HR Specialist	Within one week of being notified the recruitment file has been created		• Review the position description, applicable exclusion forms and org chart, and determine correct classification. • Complete the RTS. • Route the RTS to the State Budget and Finance (SBF) Office for approval. • SHR signs the PD for classification approval and supervisor signs the PD to indicate the work is accurately described. • Complete the applicable SHR Vacancy Report fields.
HR Specialist	After RTS is approved by TAG's Office		• Send final PD, applicable exclusions forms, and org chart to DPM for approval, if required.
HR Specialist and Supervisor	As soon as practical, typically within two weeks of receiving approved RTS and PD. (Longer if DPM class approval is required.)		Conduct recruitment meeting and/or review information obtained on the Requirements for Posting a Position form. Gather recruitment materials that covers the following: • Determine whether the internal transfer process would be appropriate. • Determine whether there is an active register. • Determine resume screening criteria and appropriate rating scale (3-point, 9-point, pass/fail, etc.), target number of people to interview, whether additional screening will be needed before interviews. • Discuss salary range, length of posting, and overall timeline for rating panel and interview panel dates.

			• Discuss specific information for job announcement: intro statement, special requirements. • Discuss telecommuting expectations and headquarters location for inclusion in job announcement. • Discuss recruitment strategies, underutilization considerations for outreach, professional networks, etc. • Identify subject matter experts for rating panel, determine rating panel date(s). The supervisor should ensure rating panel members are aware of their participation and that they agree to assist. • Identify subject matter experts for interview panel (must be diverse, including gender diversity), determine possible interview dates, length of interviews, interview format (virtual, etc.) and other details (Supervisor should ensure interview panel members agree to assist.) • Determine whether second interviews will be held. • Discuss interview question preparation.
Supervisor	Typically, one week after recruitment meeting or request for materials from HR		Provide recruitment materials to HR Specialist. Materials needed by SHR before job is announced: • Completed Requirements for Posting a Position Form which includes resume screening criteria, rating panel names, interview panel names, telework, etc. • Interview questions • Any other information needed for job announcement
HR Specialist	Typically, 1 week after all recruitment materials are received from supervisor		• Prepare Selection Assessment Strategy and finalize recruitment materials • Send draft job announcement to supervisor for review, if needed • Obtain second SHR review and approval of recruitment materials. • For internal transfers, post position on DMA public website for transfer (3 calendar days minimum) and send the DMA-All State Employee email. • For open recruitments, post on Wisc.Jobs (7 calendar days minimum for permanent, 3 days for project, no minimum for LTE) and send the DMA-All State Employee email. • Send separate email to the supervisor with the link to the posting. • Post position to any agreed upon advertising sources. • Schedule rating panel briefing for a day or two after posting is closed. Note: Timeline to create the certification list is 30 days from the date the job announcement is published.
Supervisor or Designee	During posting and evaluation period		• Reserve room for interviews if they are being held in-person. • Contact interview panel and hold time on calendars. • Automated interview scheduling through PeopleSoft may be available. Discuss with SHR.
HR Specialist	Within 1-2 business days of posting deadline		• Conduct rating panel briefing and/or send rating panel instructional materials including the Confirmation of Participation form to panel members.
Rating Panel	Within 2-4 business days of panel briefing or receipt of materials		• Complete the "Rating Panel Best Practices" training module within Peoplesoft Cornerstone prior to the rating panel, if not completed within the past year. • Return the completed Confirmation of Participation form to HR Specialist. This form needs to be returned to HR prior to the panel members receiving the applicant assessments for rating. • Score applicant assessments and enter scores in PeopleSoft. (This may be longer for larger applicant pools or unforeseen circumstances with a rating panel member.) • Federal staff that are utilized for rating panels may not be able to enter their scores directly in PeopleSoft and will need to email their scores to the HR Specialist.

HR Specialist	Within 1-2 business days of receipt of scores		• Review and analyze scores. • Obtain second SHR review and approval of scoring analysis. • Create register. • Notify candidates through PeopleSoft of status/eligibility. • Create certification list. • Inquire to the supervisor as to when the interviews are scheduled and final interview panel members. • Once the interview dates and panel member names are received, email the cert list to the supervisor along with resumes, final PD, job announcement, sample interview invitation letter, Interview Guidelines form, and approved interview questions with attached cover sheet. Note: Timeline to make a job offer is 30 days from the date of certification.
Supervisor or Designee	Within 3-4 business days of receipt of cert list		• Contact applicants from certification list to schedule interviews (should provide minimum of two business days' notice to applicants, however SHR recommends longer). • Automated interview scheduling through PeopleSoft may be available. Discuss with SHR.

Interview Panel	Provide recommendation within 2 business days of last interview		• Complete the "Interview Panel Best Practices" training module within PeopleSoft Cornerstone prior to interviews, if not completed within the past year.
			• Read the Pay Upon Appointment- Broadband Pay Schedules Policy.
			• Read and sign the Interviewer Guidelines form and return to hiring supervisor.
			• Conduct interviews.
			• Panel to discuss results and recommend top candidates for further consideration.
			• Advise SHR (and supervisor if not on panel) of interview results:
			  ◦ Top candidate to proceed with Selection Steps
			  ◦ Top candidates for 2nd interviews
			  ◦ No acceptable candidates
			• Interview panel members complete cover sheet for each candidate and provide interview packets with notes to the supervisor. The supervisor is responsible for getting the complete packets to SHR. Electronic copies are preferred with notes scanned in by candidate.

Supervisor	Within 2 days to 1 week after first round interviews (if applicable)		If conducting second interviews: • Identify second interview panel (if not already established) • Submit interview questions with benchmarks to HR Specialist for review. Benchmarks can be written for just the acceptable level rather than three levels of benchmarks. • Identify second interview date. • Contact candidates to schedule second interviews (should provide minimum of 2 business days' notice). • Automated interview scheduling through PeopleSoft may be available. Discuss with SHR.
Interview Panel	Minimum of 3-5 business days after first interviews concluded		• Conduct second interviews. • Interview panel members complete cover sheet for each candidate and provide interview packets with notes to the supervisor. The supervisor is responsible for getting the complete packets to SHR. Electronic copies are preferred.
WHO	**WHEN**	**✓**	**SELECTION STEPS**
Supervisor	As soon as practical after decision, typically 1-2 business days after all interviews concluded		• Inform HR Specialist of top candidate(s) • Provide interview notes and signed Interviewer Guidelines forms to SHR for review and records retention (if not already provided above). • Update the cert list with Reports of Action (ROA) regarding who was selected, not selected, not interested, etc. and provide to SHR.

			• Notify HR Specialist if unexpected delays or if consultation is needed for decision-making.
HR Specialist	As soon as information is known		• Notify HR Assistant Adv of the top candidate(s)
HR Assistant Adv	Within 1-2 business days of notification from HR Specialist		• Send email to the top candidate alerting them to watch for emails they will receive from SkillSurvey and DocuSign. • Send SkillSurvey tool for providing references to top candidate(s). • Check ETF for previous service. • Review personnel file (required for all current state employees). • Check Selective Service registration, if applicable. • Send background check form through DocuSign. • Provide information for fingerprinting at Fieldprint locations, if applicable. • Consult with PMO regarding background check on top candidate. • Run name based WORCS check, if required. • Check for fingerprint results in WORCS, if applicable. • Check SkillSurvey for reference check results, save to recruitment folder, and alert HR Specialist of the completed report. • Notify HR Specialist of any adverse results from the above pre-employment checks. • Complete the applicable SHR Vacancy Report fields.
HR Specialist	Within 1-2 business days of notification from HR Assistant Adv		• Share reference checks with the supervisor. • Complete salary analysis and discuss pay on appointment with supervisor. • Discuss Hiring Justification form with supervisor.
Supervisor	Within 1-2 business days of notification from HR Specialist		• After reviewing the reference check results, determine if the top candidate will proceed in the selection process. • Complete the Hiring Justification form and submit to SHR. Ensure the justification contains reasoning obtained from the interviews and reference checks.
HR Specialist	Within 1-2 business days of notification from Supervisor		• Review the completed Hiring Justification form and save to the recruitment file. • Submit Hiring Approval email with salary request to HR Director or Deputy for approval. • Submit salary request to DPM (only required for pay increases for transfer candidates).
HR Director or Deputy	Within 1-2 business days after receiving Hiring Approval email		• Review and approve/deny the requested hire and salary.
HR Specialist	Within 1-2 business days of receiving approval from HR Director or Deputy		• Send the Hiring Approval email to the supervisor with additional details such as approved salary, potential effective dates, or conditional offer information.
Supervisor	Once Hiring Approval email is received		• Call candidate to make job offer or conditional offer (see conditional offer instructions below). • Discuss other important information about the position (first day schedule, attendance at New Employee Orientation, work schedule, dress code, project employment provisions, LTE provisions, part-time schedules, telecommuting, parking, etc.). Supervisors should be familiar with additional onboarding requirements in their directorates. • Notify all DMA SHR staff of accepted offer and agreed upon effective date using the DMADLSHR@widma.gov.

			Conditional Offers for MASO and Fire Crash Resue Positions: • **MASO**: Call candidate to make conditional offer since positions are contingent on passing a pre-employment medical, drug, physical readiness test (PRT), and psychological exam. • **Fire Crash Rescue**: Call candidate to make conditional offer since positions are contingent on passing a pre-employment medical, drug, and physical readiness test (PRT). • Notify all DMA SHR staff of accepted conditional offer using the DMADLSHR@widma.gov. • Call the medical facilities to schedule pre-employment medical exams. Notify the SHR Medical Coordinator at DMAMedicalCoordinator@widma.gov of the dates of the scheduled appointments.
HR	Conditional Offers: As soon as practical after all the medical results are received		• Notify supervisor when all pre-employment screens are cleared. • Inform supervisor of potential effective dates.
Supervisor	Conditional Offers: As soon as practical after receiving Hiring Approval email		• Call candidate to make the final job offer and decide upon effective date. • Notify all DMA SHR staff of accepted offer and agreed upon effective date. Utilize the DMADLSHR@widma.gov.
WHO	**WHEN**	✓	**POST-HIRE ACTIONS**
Supervisor	As soon as practical after job offer accepted		• If applicable, notify internal applicants (current DMA employees) personally that they were not selected. This should typically be done by phone or in person and not via email.
Supervisor	At least 7 business days prior to effective date		• Ensure existing IT equipment is refreshed for new employee or considered for replacement. • Complete a Service Request for IT equipment, access, software, and license needs. • Start planning for new employee's arrival, prepare workspace, determine equipment needs, office supplies, training plan, etc.
HR Assistant Adv	Before effective date		• Obtain necessary demographic information from new hire through DocuSign. • Enter employee information and appointment into Peoplesoft. • Complete the DMA State IT, New Employee Account Creation Request. • Create appointment letter for HR Director signature. • Email original signed appointment letter to employee with the I-9 form. • Email the signed appointment letter to the supervisor in a separate email.
HR Assistant Adv	Within 2 weeks of accepted offer		• Enter ROAs into TAM. • Send non-select notices to applicants through TAM.
HR Assistant Adv	Tuesday prior to orientation day		• Send orientation email, agenda, I-9 form/instructions to new employees and copy supervisors. • Send list of attendees to JFHQ Security, orientation presenters, and other individuals as needed.
Payroll	Tuesday or Wednesday prior to orientation day		• Send New Hire Payroll & Benefits informational email to new employee's personal email address.
TAGO SHR SBF IT PMO Legal	Day 1 Orientation		• Welcome to DMA & present training modules. • Review I-9 with employee and obtain proper documents for completion. • Create photo ID and access card. • Gather employee signature on PD as well as all other new employee paperwork. • Complete initial IT logon into IAM and PeopleSoft.
HR Assistant	During employee's first week		• Send scanned copies of signed documents to the supervisor and new employee.

Supervisor	During employee's first week		• Review PD and org chart with employee. • Discuss work schedule and call-in procedures. • Log issued equipment and keys as assigned inventory. • Ensure IT accounts are accessible such as email, Teams, PeopleSoft, network drives, and shared mailboxes.
HR Assistant Adv	During employee's first week		• Send New Employee Orientation survey.
Supervisor	During employee's first week		Remind new employee to verify their personal information in PeopleSoft and discuss with SHR as necessary. • Demographic information • Disability status • Racial/Ethnic groups • Veteran status • Direct deposit • Emergency contact information • Personal information summary – as well as RAVE emergency alert system • W-4 tax information
Supervisor	During employee's first month		Ensure new employee has completed their required trainings in their MyLearning module of PeopleSoft. • IT Security • Public Records • Respectful Workplace • Moving Beyond Compliance Ensure new employee has completed their recommended trainings in their MyLearning module of PeopleSoft. • Employee Assistance Program Orientation: Acentra Health OR • Employee Assistance Program Orientation for Managers: Acentra Health
Supervisor	During the employee's first month		• Remind new employee to complete their benefits enrollment, as applicable, and discuss with payroll as necessary. • Complete Goal Setting step in PeopleSoft ePerformance module. • Discuss performance goals and objectives.
Payroll	During the employee's first month		• Ensure new employee has completed their benefits enrollment, as applicable.
Supervisor	3 months after hire and at 3-month intervals while employee is on probation		• Conduct probationary performance evaluations utilizing the ePerformance module in PeopleSoft.
Supervisor	During first year		• Ensure supervisory employees enroll in Enterprise New Supervisor Development Training in their MyLearning and provide dates to SHR.