**CO CHEAT SHEET FOR On Boarding A Leadership Applicant in the LMT**

ALL SGCs, DCs, RCs and state leaders should at least weekly check:

**the LMT for people who are in the “Open/In Process” status, first two line items in the "Your State" box that comes up when you select Dashboard from the drop down after you sign in to COS. Applicants for all roles will show up there after the application has been completed. (Some applications will not show up if the applicant fails to click the “Submit Application” button, fails to complete the survey, or submits an incomplete application). If the applicant says the application was filed but it doesn’t appear in the LMT, it’s necessary to track down the reason(s). When the application shows up in the LMT, proceed to the next steps.**

**IMPORTANT NOTE: PLEASE USE THE CONTACT LOG in the notes and comments section of applicant’s LMT profile to record all interactions with a candidate.**

1. **Examine the applicant's LMT profile and make sure green checkmarks\* appear below the "Open Profile" button. (see doc at** [**https://conventionofstates.com/files/pre-processing-for-co-lmt-applicants**](https://conventionofstates.com/files/pre-processing-for-co-lmt-applicants%20) **for help with this)**

Be certain that the applicant has a green check mark for the email blast opt-in

If the applicant has a text capable phone a green check mark should appear for text blast opt-in and SMS message OK should be checked

2. **Read the applicant's response to the survey questions then engage the applicant by phone.**

Determine if the applicant has a basic understanding of the role and a willingness to perform the role. When you have spoken to the applicant, use the "Contact Log" in the "Notes and Comments" section to record a Meaningful Interaction" note. IF you are unable to reach the applicant by phone, use the drop down menu to record the appropriate note. If you believe the applicant is a good fit for the role, indicate that by selecting "Vetting" in the drop down, menu and submitting a note with your analysis of the applicants qualifications. There is a Vetting guidelines document that is pinned to the #resources-library channel in COSColorado Slack workspace. On the same channel is also a red flags protocol document which you may find helpful as you interview candidates. Both of these documents are helpful in interviewing candidates when determining which roles they may find to their benefit.

3. **Send a "follow up" email to the applicant with instructions for processing their application**.

From the applicant’s LMT profile, send an email to the applicant. (ONCE AN APPLICATION HAS BEEN SUBMITTED, ALL EMAILS SHOULD BE SENT FROM WITHIN THE APPLICANT’S LMT PROFILE SO THERE IS AN EASILY ACCESSIBLE RECORD OF COMMUNICATIONS).

FOR ALL LEADERSHIP/TEAM APPLICANTS: Select the “Send Role Manual” (located in the “Applications History” section) to send an automated email that contains a link to the Training Manual for their application role. Once the applicant acknowledges that they have reviewed and esigned the last page of the training manual, the Citizen Builder system will auto check two boxes on the checklist titled “Leadership Role Manual Sent” and “Leadership Role Manual Acknowledged”. For specific training on the role manual automation see 3 minute video at <https://rumble.com/v3ro8vm-role-manual-automation.html>.

Send an email referencing the four fundamental COSU courses required for all applicants to complete before assignment: COS-100, COS-200, GOV-100 and VOL-100.

FOR DC APPLICANTS: Please reference the DC Training Landing Page at: <https://conventionofstates.com/colorado-district-captain-training>, This landing page will step them through the pre-assignment training process. It will also ask them to complete the DC-100 course.

Verify completion of the COSU courses:

Near the bottom, left column, of the applicant's LMT profile is an entry labeled "COS University courses:" with a number designated to the right of that line. If the number is in blue, you can select it to view the applicant's transcript. Alternatively you can....

Use "COS University" under the "Tools" heading to look at an applicant's transcript, using the "Students" tab, then enter their last name in the search box at the right. If no record is found, then the applicant is not yet enrolled. If applicant is enrolled, click on the blue transcript number in the far left column to see applicant's progress.

4. **Use the Contact Log to record ALL CONTACTS WITH APPLICANT, including phone calls, vetting, texts, etc.**

Use the drop down menu on the "Contact Log" to select results of initial phone call and vetting discussions. The Contact Log is used to check several of the “auto checked” items in the on boarding checklist. ALWAYS use the CONTACT LOG to help navigate and update the candidate’s checklist. When applicant is ready to begin pre-assignment training use the Contact Log and select "Onboarding Initiated" and input your note. The applicant has been assigned to you and you will monitor their progress through the pre-assignment training using the "onboarding checklist" in the right column, scrolling down. The items having the notation “Manual check” must be checked manually when completed (duh!); the "autochecked" items in the checklist are updated automatically based on entries in the Contact Log. At each step make an appropriate entry in the "Contact Log".

5. **When the applicant has completed all pre-assignment training, make the assignment.**

Use the "Contact Log" drop down menu to select "Onboarding Training Completed".Scroll down to the bottom of the applicant's LMT profile and make the appropriate assignment, including house and senate districts in the "Role/Assignment Management" box in the right column. Be sure to give the reason you are making the assignment then click on the blue "Assign" button.

6. **Make a post assignment phone call and email, with further instructions**.

Use the "Create COS Action Email Account" section to create a forwarding account for the applicant.

Call the applicant and congratulate them on their new assignment and let them know that they will receive an email with links to post-assignment training. Also mention that they should contact you with any questions or concerns. Don't forget to leave a note about this contact.

A Post-assignment email should be sent containing the following:

a link to the appropriate role training in COS University, ie FUT-100 for FUT members, DC-100 for DCs, etc.

copy the DC or RC that will direct their efforts

introduction and contact information for their DC or RC as appropriate.

request notification when they complete the appropriate COS University course.

notify them that a cosaction.com email account has been created and share the email address with them. Also list the email account it will auto forward to.

7. **Set the assigned applicant's cosaction.com email address as "PRIMARY" in the "User" profile**

Use the "Open Profile" button to go to the assignee's User profile. Select the "Emails" tab in the right column near the top. If the cosaction.com account is NOT set as Primary, make it so.

Complete the manual portions of the "Post Assignment Steps" checklist. Invite to the COSColorado Slack workspace. If you don't have invitation capability contact the SIA team lead (Karl Morrison) or any other state executive leader to issue the invitation.

This complete's the onboard training and post assignment process. The new leader is now ready to contribute to the CO COS team, with our gratitude.

**For additional help see:** **LMT Applicant Processing (pdf doc) at**

[**https://conventionofstates.com/co-state-sia-team-resources**](https://conventionofstates.com/co-state-sia-team-resources) **under DC and State Leader Training.**

**\* "is veteran" checkmark is immaterial for this process**