

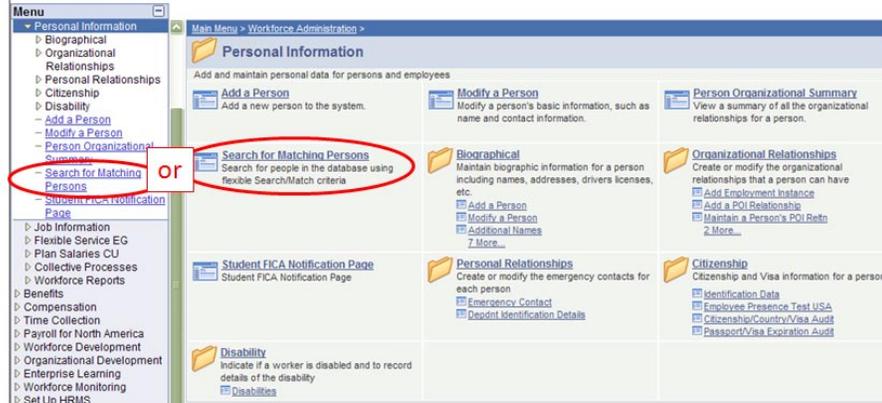
8.9 HRMS Step by Step Guide

Add a Person (POI Types Including Pre-Employment) - Workforce Administration Module

Note: The screen shots used in this guide may not be representative of your access.

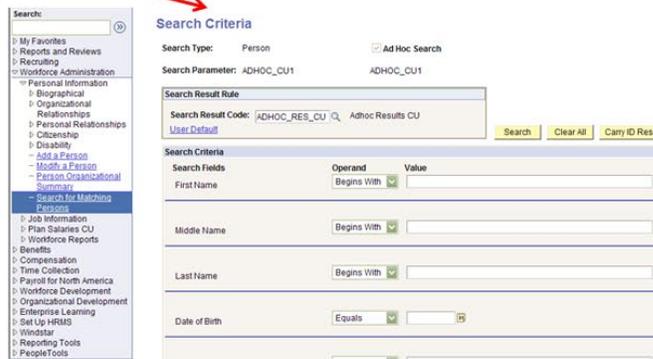
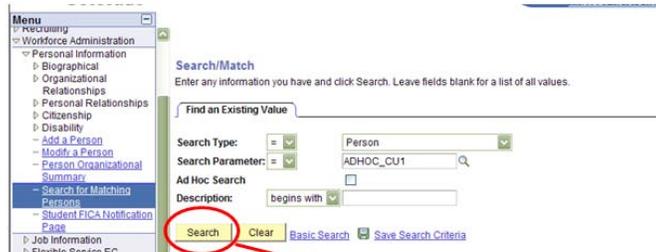
1. Navigate to search for matching persons.

- Workforce Administration
- Personal Information
 - To begin, verify that the Person does not already exist in HRMS
- Click on [Search for Matching Persons](#)
- Click on [Search](#)



2. Search Criteria page displays.

- Enter name data in search field of your choice; it is recommended to keep your search as broad as possible. Ex: search by Last Name only
- Ex of an inaccurate search using both First and Last Name: if searching for 'Mike' Buble, there will be no results because the legal/recorded name in HRMS would be 'Michael' Buble
- Name fields are *Case Sensitive*. Ex: Buble (not BUBLE or buble)
- Note: If using SSN, enter numbers only, without dashes. Using the National ID (SSN) may not provide any data for existing POIs who are not a Security Access POI.



- Click 

3. Search Results page displays

- When the person *does not already exist*, begin the Add a Person process
- Click on [Add a Person](#) in the left-hand navigational menu and continue to Step 4
- Note: If person *does exist*, regardless whether active or inactive, refer to step-by-step guide, *Add (or Add Additional) POI Relationship*

Search Criteria

Search Type: Person Ad Hoc Search

Search Parameter: ADHOC_CU1 ADHOC_CU1

Search Result Rule

Search Result Code: ADHOC_RES [User Default](#) [Clear All](#) [Carry ID Reset](#)

Search Fields	Operand	Value
First Name	Begins With	Michael
Middle Name	Begins With	
Last Name	Begins With	Buble



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HR02MR R01070 Home | Add to Favorites | Sign out

Menu

Search:

My Favorites

Reports and Reviews

Recruiting

Workforce Administration

Personal Information

Biographical

Organizational Relationships

Personal Relationships

Citizenship

Disability

Add a Person

Person Organizational Summaries

Search for Matching Persons

Job Information

Plan Salaries CU

Workforce Reports

Main Menu > Workforce Administration >

Personal Information

Add and maintain personal data for persons and employees

Add a Person
Add a new person to the system

Modify a Person
Modify a person's basic information, such as name and contact information.

Person Organizational Summary
View a summary of all the organizational relationships for a person.

Search for Matching Persons
Search for people in the database using flexible Search/Match criteria

Biographical
Maintain biographic information for a person including names, addresses, drivers licenses, etc.

Organizational Relationships
Create or modify the organizational relationships that a person can have

Personal Relationships
Create or modify the emergency contacts for each person

Citizenship
Citizenship and Visa information for a person

Disability
Indicate if a worker is disabled and to record details of the disability

4. Add a Person page displays

- Click on [Add the Person](#)

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HR09TEST T PPL Home | Worklist | Add to Favorites | Sign out

New Window | Customize Page | 

Add Person

Person ID: NEW [Search for Matching Persons](#)

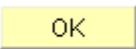
[Add the Person](#)

5. Biographical Details page displays

- Effective date defaults to current date; leave as is or change to other appropriate date. This date cannot be future-dated. If setting up the POI Type of pre-employment, the actual *date of hire* will be recorded in Job Data via the Add Employment Instance process when ready to hire

- Click [Add Name](#)

6. Edit Name page displays

- Enter name information
- Click  to return to Biographical Details page

Edit Name

7. Biographical Details page required fields

- Date of Birth
- Gender
- SSN/National ID is only HRMS-required for POI type 00015, "**Security Access.**" Enter numbers only, without dashes. (NOTE that campus offices such as IT may require SSN's for other POI types.)

▪ Click on [Contact Information](#)

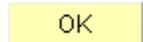
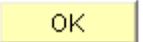
8. Contact Information page displays

▪ Click [Add Address Detail](#)

9. Home Address History page displays

▪ Click [Add Address](#)

10. Edit Address page displays

- Enter address
- Click  and then  again

11. Contact Information page re-displays

- If Mailing address is different than Home address, click + by  to add a record.

Address Type	As Of Date	Status	Address	Edit/View Address Detail
Home	06/01/2010	A	72 North Pine Lafayette, CO 80026 USA	
Mailing				

- Select "Mailing" from the dropdown menu and then 

- Click on  to add additional phone numbers
- Click the Preferred box for the primary number (check only one)
- Enter email(s) such as Home or Other
 - Click on  to add additional email addresses
 - If more than one email entered, click the Preferred box for the primary email (check only

Address Type	As Of Date	Status	Address	Edit/View Address Detail
Home	06/01/2010	A	72 North Pine Lafayette, CO 80026 USA	
Mailing	08/02/2010	A	PO Box 123 Lafayette, CO 80026 USA	

*Phone Type	Telephone	Extension	Preferred	
Home	303/999-9999		<input checked="" type="checkbox"/>	
Campus 1	303/735-9999		<input type="checkbox"/>	

*Email Type	*Email Address	Preferred	
Campus	mike.buble@cusys.edu	<input type="checkbox"/>	

one)

- Email Address – Official: Required for all POI's*

*"Official" Email Address : This required email address is the official email for the university and by policy must be created by your campus IT department (not the affiliate department). **After saving, contact your IT department and provide them with your new POI's HRMS ID.** The morning after the email has been created in the campus email directory, it will be loaded into HRMS and other University systems (e.g., SkillPort).

After the "Official" email has been loaded, it will automatically default to 'Preferred.'

- Click [Regional](#)

12. Regional page displays

- Ethnic Group is required. Primary box will be checked automatically for first choice. For POIs, it is acceptable to select NSPEC - Chose not to Disclose
- If applicable, enter additional ethnic groups by inserting a row [+](#)

Ethnic Group	Description	Short Description
AFRAM	African American	Afr Amer
AMIND	American Indian/Alaska Native	Am_Ind
ASIAN	Asian	Asian
CAUCASIA	Caucasian	Caucasian
HISPA	Hispanic/Latino	Hispanic
NSPEC	Chose not to Disclose	No Dsclosd
PACIF	Native Hawaiian/Other Pacific Islander	Hawaii/Pac

- A Military Status must be chosen for each person in order to set the effective date for this section. Unless military status is known, choose "Not indicated".

Smoker	As of
1 Yes	

- Click

[Dept Information/Verifications](#)

13. Dept Information/ Verifications page displays

- Home Department and Campus Box are required.

- Click

[Organizational Relationships](#)

14. Organizational Relationships page displays

- NOTE: This tab is only available in Add a Person.

- Check Person of Interest box Person of Interest -- dropdown list will appear:

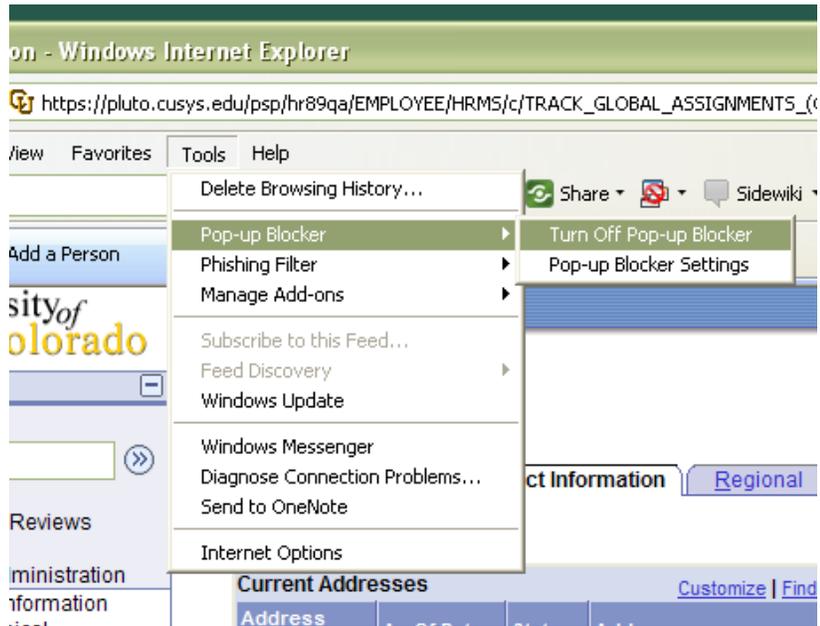
Person of Interest

- Select POI Type from the drop-down list

- NOTE: Before saving record, be sure that your Pop-up Blockers are off! See below.

- Go to Internet 'Tools'
 - Select 'Pop-up

- Blocker'
- Select 'Turn Off Pop-up Blocker'
- If not turned off, this POI entry will default to a status of POI Unknown, and be visible only in Modify a Person and POI will not be added to SkillPort. To fix this, and finish the POI entry, refer to [Add Additional POI Relationship](#) step-by-step guide



Warning -- Social Security Number should be entered for US Employees. (1000.835)

Social Security Numbers are now required for all persons employed in the United States regardless of citizenship status. You must track this information and should require that it be provided by Employees when they are Hired.

OK Cancel

- For Security Access POI type (00015), warning re: need for SSN may appear – click OK or add SSN if needed. Enter numbers only, without dashes.
- **NOTE: Campus offices, such as IT, may require SSN's for other POI types.**

15. Add Person of Interest page displays

- Sponsoring Department and Current Contact info default to info entered to *Add a Person*; change if needed
- Effective date defaults to effective date entered on *Add a Person Biographical page* (Step 5). Leave as is
- Status defaults to 'A' (Active)
- Planned Exit date defaults to one year from the effective date. Change if appropriate. Ex: POI will be active for only one month – change the Planned Exit date to reflect only one month
- More Information section: enter additional information as appropriate
- Click **Add to Skillport** if needed.
- Click **OK**, then **Save** on popup window. **These pages MUST BE SAVED, regardless of whether any changes were made!**
 - If not saved, this POI entry will default to a status of POI Unknown, and be visible only in

Add Person of Interest

Buble, Mike Person ID: 222206

Person of Interest Type: Other Fiscal Relationship

POI Description:

Sponsoring Department: 10363 Music-Macky Auditorium **Add to Skillport**

Originally entered by: Brown, Lauren Shelley Current Contact 101012 Donadio, Carolyn Elena
174868 303 7355772 303/735-6500

Security Data Find | View All | First 1 of 1 | Last

*Effective Date: 06/01/2010 Get Enabled Security Types

Security Access Type	Enabled	Value 1	Value 2
BUSINESS UNIT	<input checked="" type="checkbox"/>	Business Unit	UCOLO

Person of Interest History Customize | Find | First 1 of 1 | Last

*Effective Date	*Status	Planned Exit	More Information
1 06/01/2010	A	06/01/2011	

OK **Cancel** **Apply**

Add a POI Relationship - Windows Internet Explorer

https://pluto.cusys.edu/psp/hr09qa_1/EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_(GBL).PERS_POI_ADD.GBL?P...

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Add Person of Interest

Krebs, Maynard G. Person ID: 222216

Person of Interest Type: Other Fiscal Relationship

POI Description:

Sponsoring Department: 51000 Payroll & Benefit Services **Add to Skillport**

Originally entered by: Brown, Lauren Shelley Current Contact 174868 Brown, Lauren Shelley
174868 303 7355772 303 7355772

Security Data Find | View All | First 1 of 1 | Last

Effective Date: 08/26/2010 Get Enabled Security Types

Security Access Type	Enabled	Value 1	Value 2
BUSINESS UNIT	<input checked="" type="checkbox"/>	Business Unit	UCOLO

Person of Interest History Customize | Find | First 1 of 1 | Last

*Effective Date	*Status	Planned Exit	More Information
1 08/26/2010	A	08/26/2011	

Save **Notify**

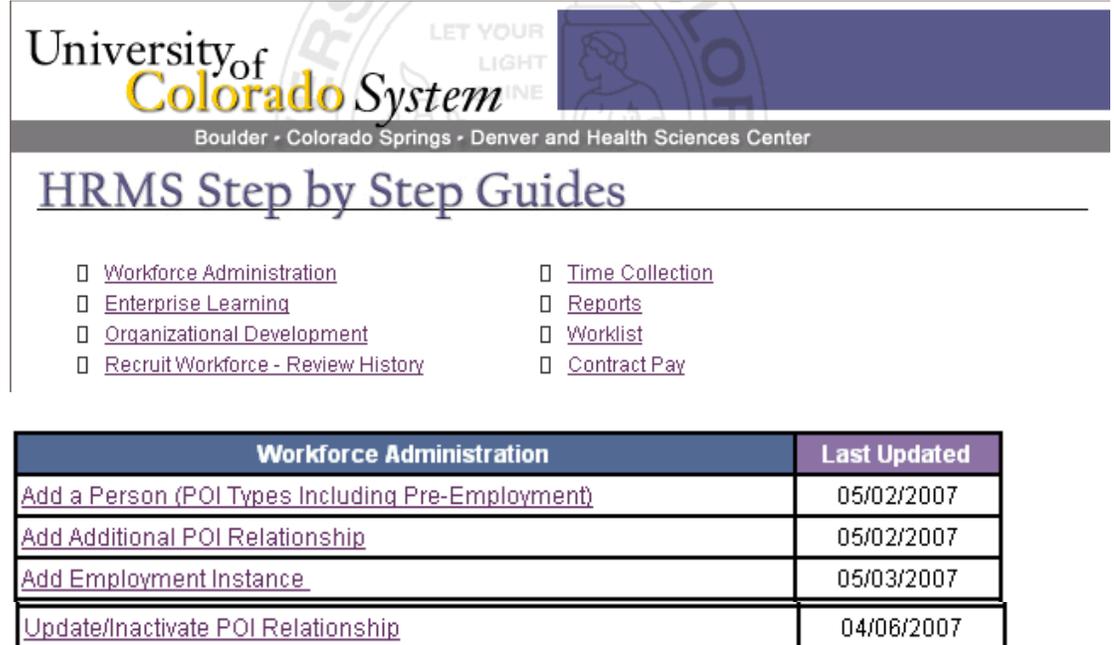
Modify a Person and POI will not be added to SkillPort. To fix this, and finish the POI entry, refer to [Add Additional POI Relationship](#) step-by-step guide

- Returns to Personal Information – Organizational Relationships page.

Click  and exit.

16. What happens next?

- If POI type selected is **Pre-Employment:** Refer to [Add Employment Instance](#) step-by-step guide when ready to hire the person. Remember to inactivate POI relationship due to hire!
- To add an additional POI type, refer to [Add or Add Additional\) POI Relationship](#) step-by-step guide
- To update or inactivate a POI relationship, refer to [Update/Inactivate POI Relationship](#) step-by-step guide



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HRMS Step by Step Guides

- [Workforce Administration](#)
- [Enterprise Learning](#)
- [Organizational Development](#)
- [Recruit Workforce - Review History](#)
- [Time Collection](#)
- [Reports](#)
- [Worklist](#)
- [Contract Pay](#)

Workforce Administration	Last Updated
Add a Person (POI Types Including Pre-Employment)	05/02/2007
Add Additional POI Relationship	05/02/2007
Add Employment Instance	05/03/2007
Update/Inactivate POI Relationship	04/06/2007

17. To view Person summary information, navigate to:

- Workforce Administration
- Personal Information
 - [Person Organizational Summary](#)
- Search for POI
- Person Org Summary page displays

The screenshot displays the 'Person Org Summary' page for a user named 'Krebs, Maynard G.' with 'Person ID: 222216'. The page features a navigation menu on the left with the following items: My Favorites, Reports and Reviews, Recruiting, Workforce Administration (expanded), Personal Information (expanded), Biographical, Organizational Relationships, Personal Relationships, Citizenship, Disability, Add a Person, Modify a Person, Person Organizational Summary (highlighted), Search for Matching Persons, Student FICA Notification Page, and Job Information. The main content area shows a 'Person of Interest Instance' table with the following data:

Person of Interest Type	Empl_rcd#	Status	Begin Date/	End Date
Other		Active	08/26/2010	08/26/2011

Below the table are two buttons: 'Return to Search' and 'Notify'. The page also includes a 'New Window | Customize Page |' link in the top right corner.

Add a Person (POI Types Including Pre-Employment) complete