8.9 HRMS Step by Step Guide Add a Person (POI Types Including Pre-Employment) - Workforce Administration Module

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 <u>Search for</u> <u>Matching Persons</u>
- Click on <u>Search</u>

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.

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



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Workforce Administration					
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Search Criteria

3. Search Results page displays

- When the person <u>does</u> <u>not already exist</u>, begin the Add a Person process
- Click on <u>Add a Person</u> in the left-hand navigational menu and continue to Step 4
- Note: If person does exist, regardless whether active or inactive, refer to stepby-step guide, Add (or Add Additional) POI Relationship
- 4. Add a Person page displays
- Click on <u>Add the Person</u>

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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 preemployment, 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 OK to return to Biographical Details page

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Suffix:	✓	
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- 7. Biographical Details page required fields
- Date of Birth
- Gender
- <u>SSN/National ID</u> 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.)

Contact Information

Click on

- 8. Contact Information page displays
- Click Add Address Detail

Home Address

History page

Click Add Address

displays

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Search for Matching Persons Student FICA Notification

Page ▷ Job Information 10. Edit Address page displays

Enter address



- 11. Contact Information page re-displays
- If Mailing address is different than Home address, click + by EditView Address

add a record.

Select "Mailing" from the dropdown menu and then

Add Address Detail

- Click on 1 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

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Biographical Details | Contact Information | Regional | Dept Information/Verifications | Organizational Relationships

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Email Address – Official: Required for all POl's*

Click Regional

*"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.'

Person ID:

NEW

- 12. Regional page Biographical Details Contact Information Regional Dept Information/Verifications Corganizational Relationships displays - USA 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
 - 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".

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 Click Dept Information/Verifications

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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 <u>Add Additional</u> POI Relationship

step-by-step guide

- 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.

on - Windows Internet Explorer

🚱 https://pluto.cusys.edu/psp/hr89qa/EMPLOYEE/HRMS/c/TRACK_GLOBAL_ASSIGNMENTS_(<

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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.

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 or , then 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:	Add to Skillport
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Modify a Person and POI will not be added to SkillPort. To fix this, and finish the POI entry, refer to <u>Add</u> <u>Additional POI</u> <u>Relationship</u> stepby-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 <u>Add</u> <u>Employment Instance</u> step-by-step guide when ready to hire the person. <u>Remember to</u> <u>inactivate POI</u> relationship due to hire!
- To add an additional POI type, refer to <u>Add</u> <u>or Add Additional</u>) <u>POI</u> <u>Relationship</u> step-bystep guide
- To update or inactivate a POI relationship, refer to <u>Update/Inactivate POI</u> <u>Relationship</u> step-bystep guide

Colorado System

HRMS Step by Step Guides

Workforce Administration

<u>Recruit Workforce - Review History</u>

<u>Enterprise Learning</u>
 Organizational Development

University_{of}

- 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 Menu New Window | Customize Page | Search: summary ۲ Person Org Summary information, My Eavorites Reports and Reviews Krebs, Maynard G. Person ID: 222216 navigate to: ▷ Recruiting
✓ Workforce Administration Person of Interest Instance Personal Information Personal mormation
 Biographical
 Organizational Relationships
 Personal Relationships Customize | Find | 🔠 First 🗹 1 of 1 🕨 Last Workforce Person of Interest Type End Dat Other Active 08/26/2010 08/26/2011 Administration ▷ Citizenship▷ Disability Return to Search 🔄 Notify Add a Person Modify a Person Person Organizational Personal Information Summary Search for Matching Persons Person Organizational Student FICA Notification Page ▷ Job Information Summary Search for POI Person Org Summary page displays

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