

8.9 HRMS Step by Step Guide

Update/Inactivate POI Relationship Information - Workforce Administration Module

Overview: This guide provides instruction for updating or inactivating a Person of Interest (POI) information. Use this guide for any change of status or planned exit date for the POI.

NOTE: HRMS only requires an SSN be added for the Security Access POI Type (00015); however Campus Offices, such as IT, may require SSNs for other POI types.

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

1. Navigate to Maintain a Person's POI Reltn page

- Workforce Administration
- Personal Information
- Organizational Relationships
- Click on [Maintain a Person's POI Reltn](#)

2. Maintain POI Types page displays

- Enter one or more search fields
- Name fields are *Case Sensitive*
- HRMS 8.9 naming convention is: Last Name, (space) First Name
- Click



Maintain POI Types

Enter any information you have and click Search. Leave fields blank for a list of all values.

EmplID:

Person of Interest Type:

Name:

[Basic Search](#)

3. Edit POI Relationship page displays

▪ **NOTE:** If the Modify a Person page displays, rather than the Edit POI Relationship page, see Step 4 or 5 below

- Update applicable information
 - Sponsoring Department
 - Current Contact EmplID #

▪ Person of Interest History section data may be updated as needed

- Click  to insert new row
- Effective Date defaults to current date. Change if necessary
- Update Status if needed
- Planned Exit date must be updated annually in order to extend system security access for POI Type 00015, *Security Access POIs*
- Enter additional comments in More Information field if necessary

▪ Click  **This page MUST BE SAVED, regardless of whether any changes were made!**

Maintain POI Types

Edit POI Relationship

Woodman, Tin Person ID: 222158

Person of Interest Type: Other Fiscal Relationship

POI Description:

Add to Skillport

Sponsoring Department: 51000 Payroll & Benefit Services

Originally entered by: 222157 | Gale, Dorothy | **Current Contact** 222157 | Gale, Dorothy 303 7355772

Security Data Find | View All First 1 of 1 Last

Effective Date: 06/21/2010

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	05/15/2010	A	05/15/2011	<input type="text"/>



Save **Return to Search** **Notify** **Refresh** **Update/Display** **Include History** **Correct History**

Person of Interest History Customize | Find First 1-2 of 2 Last

#	Effective Date	Status	Planned Exit	More Information
1	08/26/2010	A	08/26/2012	Hired
2	05/15/2010	A	05/15/2011	<input type="text"/>

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh** **Update/Display** **Include History** **Correct History**

4. Conversion of 'Security Access' POIs

Many Security Access POIs do not have a valid Social Security Number recorded for them in the 8.9 version of HRMS. This is because they were not required in the 8.3 HRMS version.

Upon conversion from the 8.3 non-employee record to the 8.9 POI record, SSNs were automatically set for Security Access POI's as '999-99-9999'.

In 8.9, when attempting to update or inactivate a Security Access POI via navigation to the *Maintain a Person's POI Reltn / Edit POI Relationship* page, the system automatically navigates to the Modify a Person's page instead. A message pops-up stating that this person must have a valid SSN. Do one of the following:

- a) if the POI is still active, enter a valid SSN (numbers only, without dashes), click  or . The system will automatically navigate to the Edit POI Relationship page. Proceed with updating your POI record (see Step 3 above).
- b) if the POI is no longer active, and you are attempting to inactivate him/her, leave the SSN field as is and click the  button at the bottom left of the page. The system will automatically navigate to the Edit POI Relationship page. Proceed with inactivating your POI record (see Step 3 above).

Update or Inactivating a POI Relationship Information complete