University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus
EMPLOYEE SERVICES

# Human Capital Management: Step-by-Step Guide

## Adding an Additional POI Type to a Person of Interest (POI)

This guide describes the process for adding more than one POI type to an active Person of Interest (POI). POI types are used to define security roles that determine what systems a POI may access. If you want to update information other than the POI Type, such as the sponsor or planned exit date, refer to *Maintaining a POI Relationship Step-by-Step Guide*.

## Contents



## Before You Begin

Before you begin, you should perform the following tasks:

- Run the Job List query (CUES_HCM_JOB_LIST) to identify whether the individual you are updating is a former employee or already has a POI relationship. You can search by Employee ID, Department ID, Job Code, the last four digits of the SSN, first name, last name and position number. Be sure to clear the Active Jobs ONLY checkbox to include more records in your results.

  To run the query from the HCM Community Users dashboard:
  1. Click the **HCM WorkCenter** tile.
  2. Click the **Resources** tab.
  3. If the query does not appear in the list of most used, select the **Click here for ALL** link.
  4. Select **Job List**.
  5. Clear the **Active Jobs ONLY** check box.
  6. Type search criteria and press **Enter**.

- If you know your POI already has relationships defined for other campuses, run the POI query (CUES_HCM_POI_REPORT) to see which POI types are already in use.

Before adding POI Types, you should have the following information available:

- The department and campus business unit associated with the POI and POI Type you are adding.
- The POI Type that determines security access. Refer to the website, https://www.cu.edu/hcm-community/policies/person-interest-poi-types, or your campus HR, for more information about which POI type you should select.
- The position number of the sponsor for this POI relationship. The sponsor is a university employee responsible for the POI.

**Navigation tips:**

▼ HCM Community Users

Procedures in this guide begin from the HCM Community Users dashboard:

1. From the portal, click **Quick Links**.
2. Click **HCM**. The Employee Self Service dashboard appears.
3. Click **Employee Self Service**.
4. Click **HCM Community Users** to display the dashboard.

The NavBar displays options for accessing other systems. Through the NavBar, you can select CU Resources to access systems on the portal.

Related actions indicator. **Right-click** to access related actions for the item you are working with. You may also see a Related Content link at the top of some pages to access related information.

The magnifying glass is called a look up and displays search results for you to select valid field values.

The book and checkmark lets you spell check text boxes.

The trash can lets you remove an item.

The down arrow lets you hide, or collapse, sections you do not want to view.

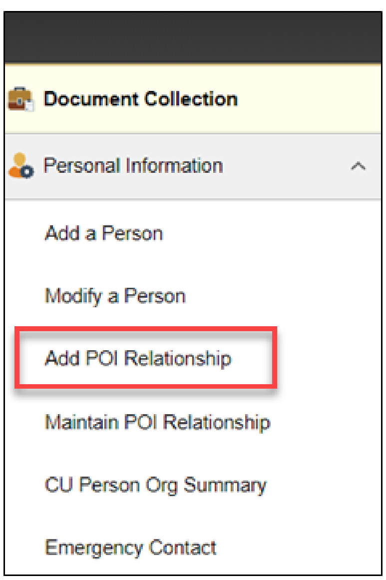
Click the arrow to expand the section.

# Adding an Additional POI Type to an Existing POI

After confirming whether the POI already has a type, you can add additional POI Types.

To search for and add a POI Type:

1. From the HCM Community Users dashboard, click the **Non-Pay Actions** tile.
2. Under **Personal Information**, click **Add POI Relationship**.



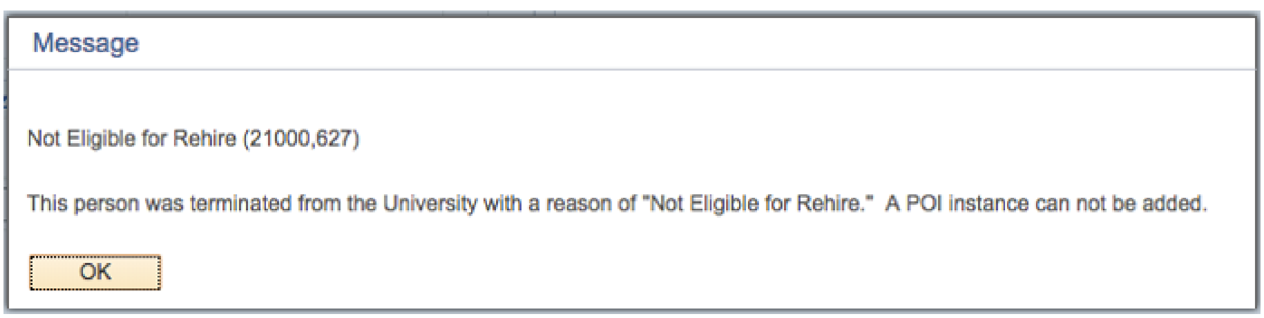
3. In the **Empl ID** field, type the Person ID of the POI, and press **Tab**.
4. From the corner of the Empl ID field, right-click the related actions indicator to display options for related content.


5. Select **CU Person Organizational Summary** to verify the last action-reason code associated with this person and make sure this POI is eligible to obtain a POI relationship.

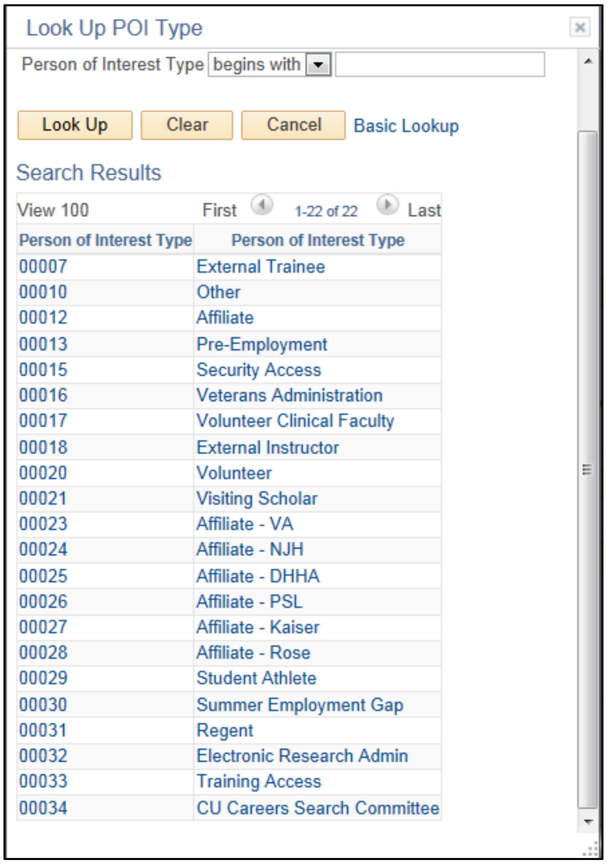
**Warning:** The CU Person Organizational Summary includes the last reason code listed in Job Data, if applicable. If you see Termed for Cause, stop this process and contact the appropriate office listed below:

- **CU AMC:** Director of Employee Performance and Development Doug.Kasyon@ucdenver.edu
- **CU Denver:** Director of Employee Performance and Development Doug.Kasyon@ucdenver.edu
- **UCCS:** Human Resources at 719-255-3372
- **CU Boulder:** Records Office at 303-492-4844
- **System Office:** Human Resources at Systemhr@cu.edu

If the POI is a prior employee who was terminated with a reason of **Not Eligible for Rehire**, the system displays a message indicating the termination and you will not be able to move forward. Contact Campus HR for assistance.

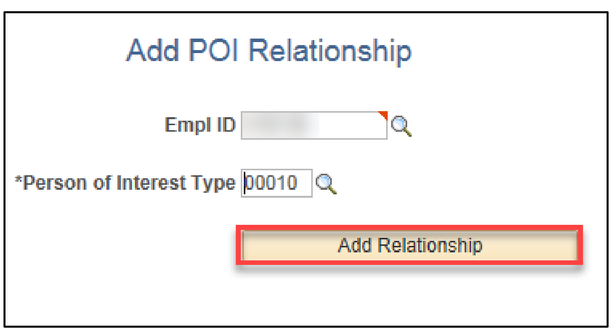


6. Click the look up and select the POI Type you want to add:




Refer to the website, https://www.cu.edu/hcm-community/policies/person-interest-poi-types, or your campus HR, for more information about which POI type you should select.

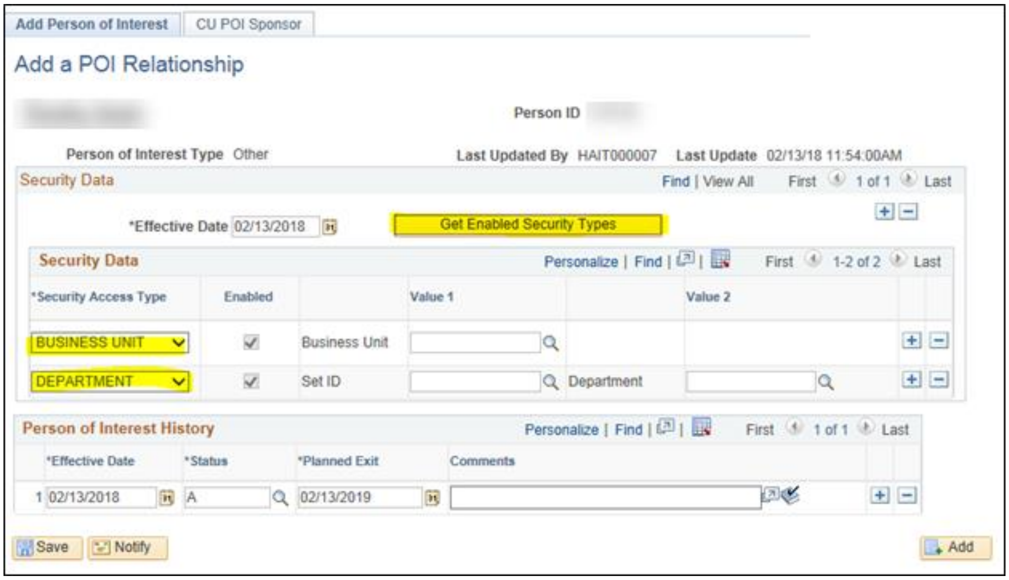
7. Click **Add Relationship**.




The system displays the Add a POI Relationship page at the **Add Person of Interest** tab.

8. The **Effective Date** displays the default to today's date. Update if necessary.

9. Click **Get Enabled Security Types**. Two lines will appear in the Security Data section: Business Unit and Department.




10. Select or type the **Business Unit**, **Set ID** and **Department**.

**Warning:** Do not use UCOLO for your business unit. This field should be populated with the appropriate business unit for your campus.

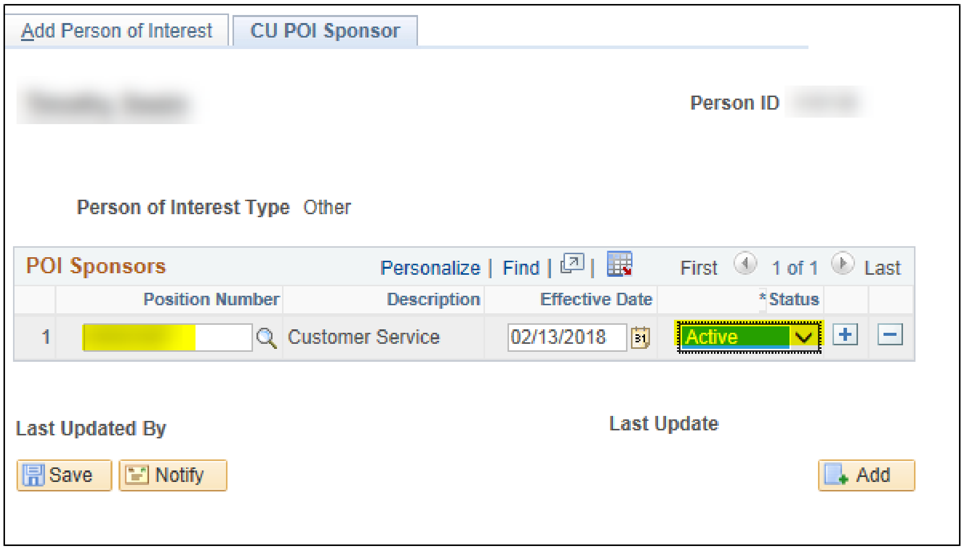
11. **Planned Exit Date** automatically populates to one year from today. Update as necessary.

**Note:** You cannot enter a Planned Exit Date that is greater than five years from today. This field is used by Employee Services to inactivate POIs whose planned exit dates have passed.

12. Enter **Comments** as necessary.

13. Click the **CU POI Sponsor** tab. A POI sponsor is required in HCM. You must enter sponsor information before leaving this page. If you do not know who the sponsor should be, contact Campus HR.

14. In the **Position Number** field, type the position number of the POI's sponsor. You can use the look up to search for and select the position number. After you select the position number, the system displays the position's title.




15. From the **Status** list, select **Active**. A POI must have an active sponsor at all times.

16. Click **Save**. The **Last Updated By** time and date stamp will display after saving.