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

Human Capital Management: Step-by-Step Guide

Adding a Person of Interest (POI)

This guide describes the process of adding a Person of Interest (POI). A POI is any person not paid by the university, such as a volunteer, who needs access to a university system as part of their relationship with the university. Adding a POI is similar to creating an employee record in that it creates a unique ID for the POI. When you create the POI, you will assign a POI type, which defines the security role of the POI.

Contents

Before You Begin

To avoid errors and duplication in HCM, it is important that people added to the system do not already have a record. Before you add a POI, make sure the person you are adding does not already exist in the system. There are two methods you should use to make sure the person is not in the system:

- Run the Job List query (CUES_HCM_JOB_LIST). The Job List query lets you search by Employee ID, Department ID, Job Code, the last four digits of the SSN, first name, last name and the position number. Be sure to clear the Active ONLY check box 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 ONLY** check box.
  6. Type search criteria.
  7. Double-check that your criteria is entered correctly. Mistyping a name, ID, or SSN will yield incorrect and possibly misleading data; leading you to create a duplicate record.
  8. Click **View Results**.

- Search for matching persons through Add a Person. This method is described in this guide.

Perform **both** of these tasks before creating a POI.

If after performing both of these tasks, you find the POI exists in the system, stop and follow the correct procedure described in one of the following guides:

- *Adding an Additional POI Type Step-by-Step Guide*
- *Maintaining a POI Relationship Step-by-Step Guide* (Includes extending the planned exit date.)

Before creating a POI, you should have the following information available:

- Personal information, including name, date of birth, contact information, and National ID (Social Security Number, or SSN). An SSN is needed only for POIs with a Security Type (00015) or Pre-Employment Type (00013). Check with your Campus HR for specific guidelines related to SSNs.
- The Department and Campus Business Unit associated with the POI. This information is required.
- The POI Type that determines security access. Refer to the *POI Types Job Aid* for details.
- The position number of the sponsor for this POI. The sponsor is a university employee responsible for the POI.
- Some locations use the POI Worksheet, available on the portal, to gather this information.

Navigation tips:

▾ HCM Community Users

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

1. From the portal, click the **HCM** tile. The Employee Self Service dashboard appears.
2. Click **Employee Self Service**.
3. 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.

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.

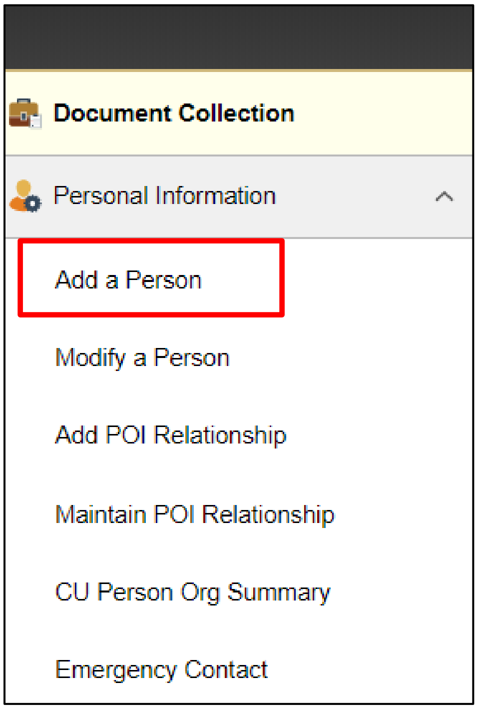
The down arrow lets you hide, or collapse, sections you do not want to view.

Click the arrow to expand the section.

Searching for Matching Persons

To search for matching persons before adding a person:

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

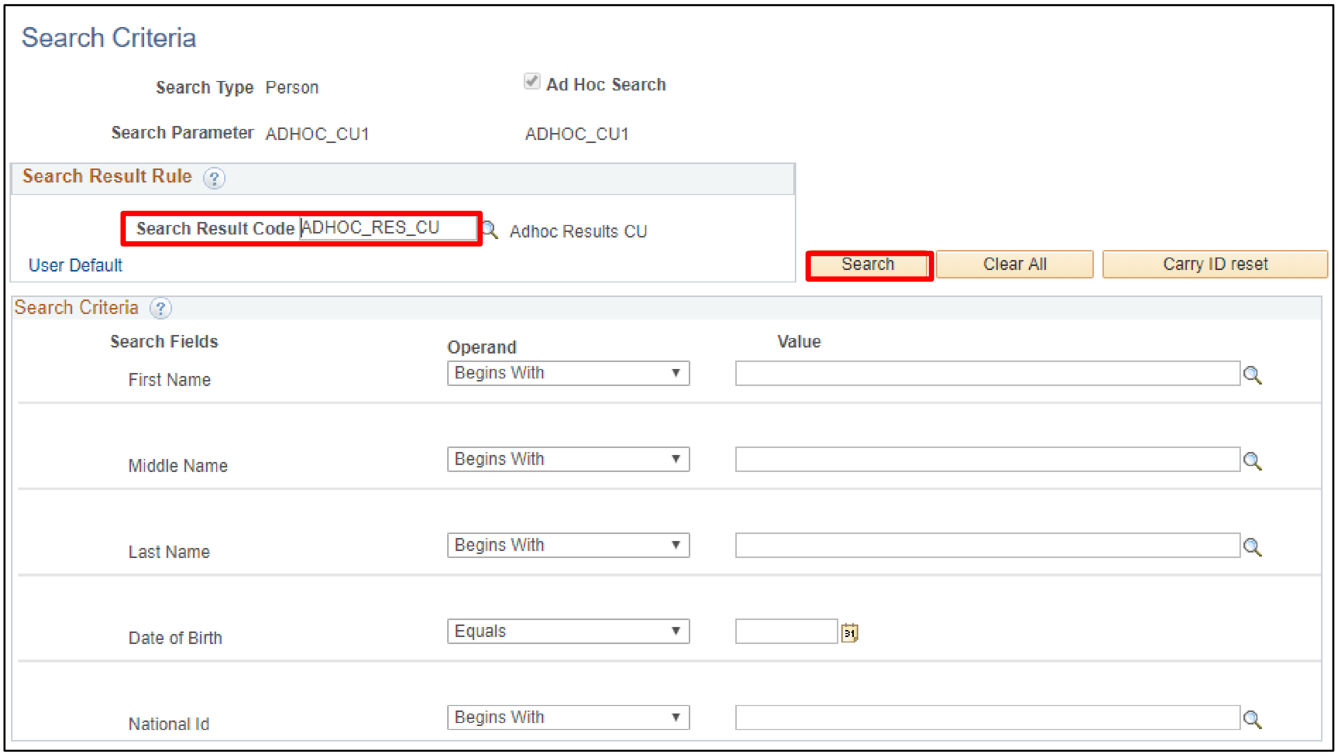


3. Click **Search for Matching Persons**.

4. In the **Search Result Code** field, type **ADHOC_RES_CU**. You can also use the look up to search for and select this code.

5. Enter search criteria and click **Search**.

   Warning: These fields are case-sensitive. (Searches entered in lowercase will not display results because names have the initials capitalized.) Enter as little information as possible to ensure a wide search.

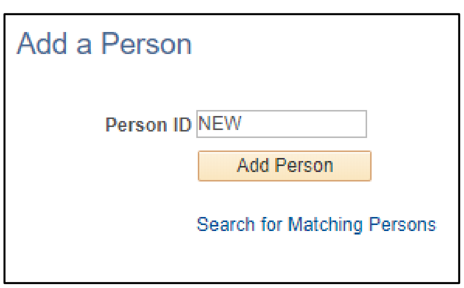


6. If the POI exists in the system, stop. Refer to the appropriate guide listed at the beginning of this guide for the task you need to perform.

Adding a Person

After confirming the POI does not exist in the system by running the Job List query and by using Search for Matching Persons, start your transaction:

1. From the HCM Community Users dashboard, click the **CU Non-Pay Actions** tile.
2. Under **Personal Information**, click **Add a Person**.
3. Click the **Add Person** button.



Note: Do not change the Person ID. The field should display **NEW**. The system will automatically assign a Person ID upon saving the transaction.

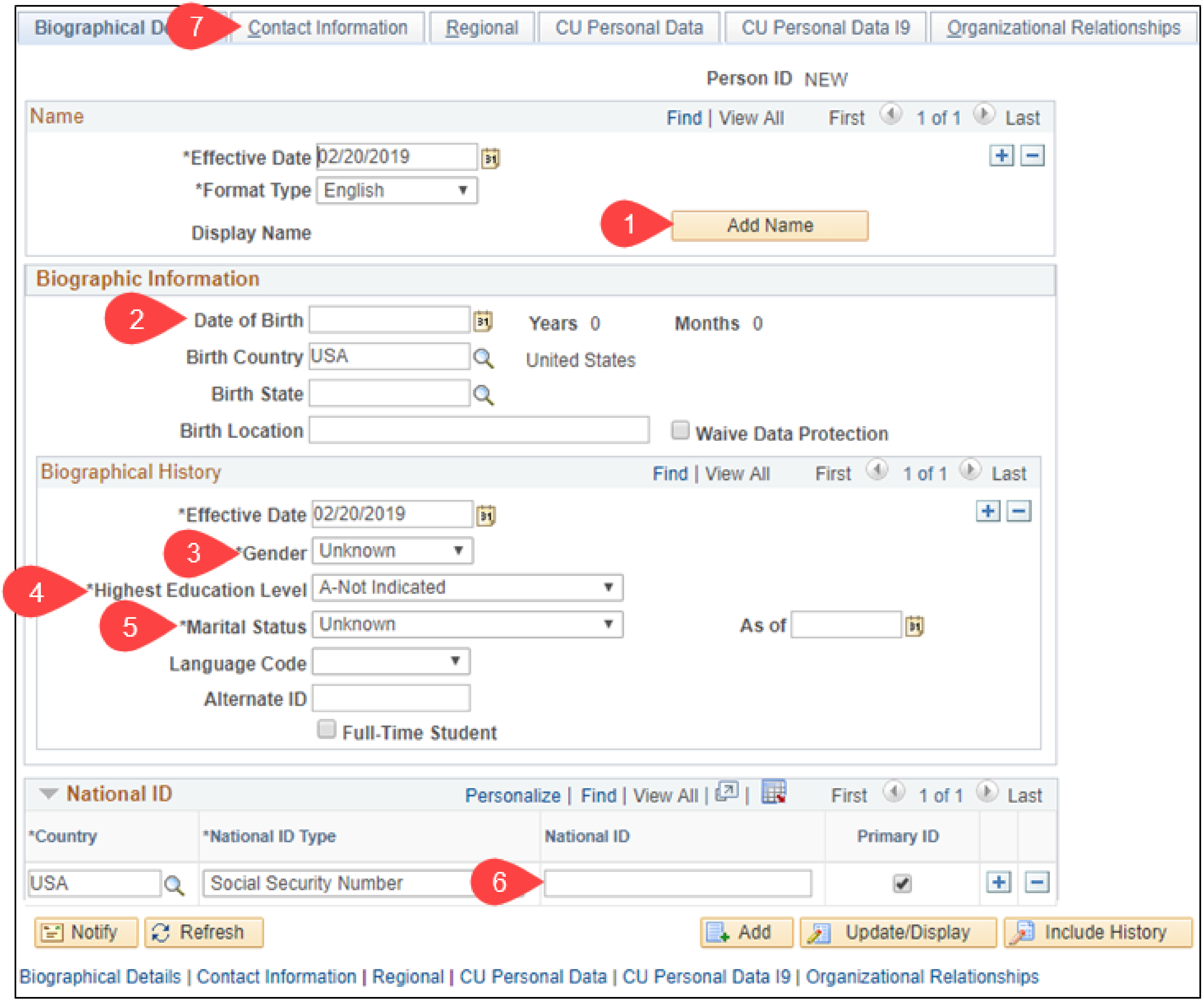
Entering Personal Information

Adding a person involves entering specific personal information on each tab of the Add a Person page.

Note: The Effective Date values on these tabs default to today's date. You cannot enter future dates.

Entering Biographical Details

The following image shows the Biographical Details tab and highlights each of the steps below.



To enter the POI's personal information:

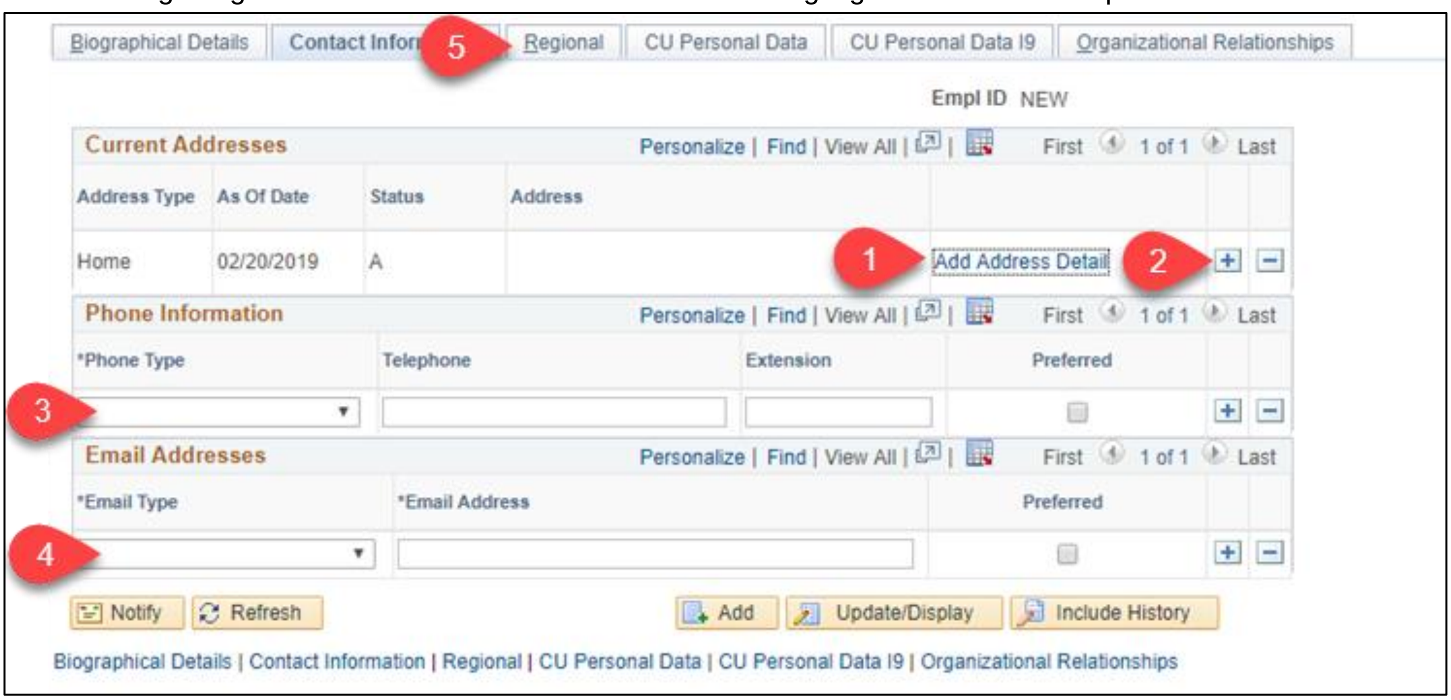
1. From the **Biographical Details** tab, click **Add Name**.
    a. Type the **First** and **Last Name**.
    b. Click **OK**.
2. Enter the **Date of Birth**.
3. Select a **Gender**.
4. Select a **Highest Education Level**.
5. Select a **Marital Status**.
6. In the **National ID** field, type the Social Security Number (SSN) of the POI. Only populate this field for POIs with a Security Type (00015) or Pre-Employment Type (00013). This is required by the SSN Procedural Statement.

    Warning: Do not enter invalid or fictitious SSN values. If you do not have a valid SSN, leave it blank and allow the system to automatically populate it with XXX-XX-XXXX. This makes it easy for Employee Services to report on.

    Denver and Anschutz campuses should not allow the system to automatically populate the National ID. Refer to the job aid, *Person of Interest and Social Security Number Processes-UCD and AMC Only* for more information. Click the **Contact Information** tab.

Entering Contact Information

The following image shows the Contact Information tab and highlights each of the steps below.



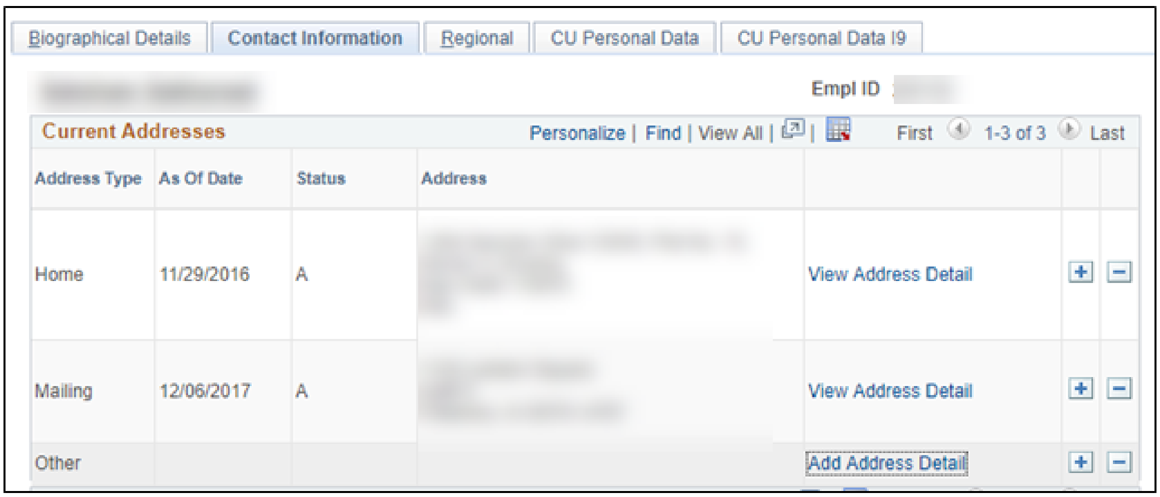
1. Click **Add Address Detail** to add a Home address.
   a. Click **Add Address** and enter a valid home address.

      Note: If you have an international employee with an international home address, enter the international address as Home and the person's current, local mailing address as Mailing. If you only enter a home address, the system copies the home address to the mailing address through a nightly process.

   b. Click **OK**.
   c. Click **OK** again.

2. If needed, you can enter an additional address by clicking the plus button in the Current Address section and repeating the previous step.

   Note: If you are adding more than one address, and you specify a future date, the address will not display on this page until the date that was entered. It will display if you click **Add Address Detail**.



3. Select a **Phone Type**, enter a **Phone Number** and click the **Preferred** box.
4. Select an **Email Type**, enter an **Email Address** and click the **Preferred** box.
5. Click the **Regional** tab.

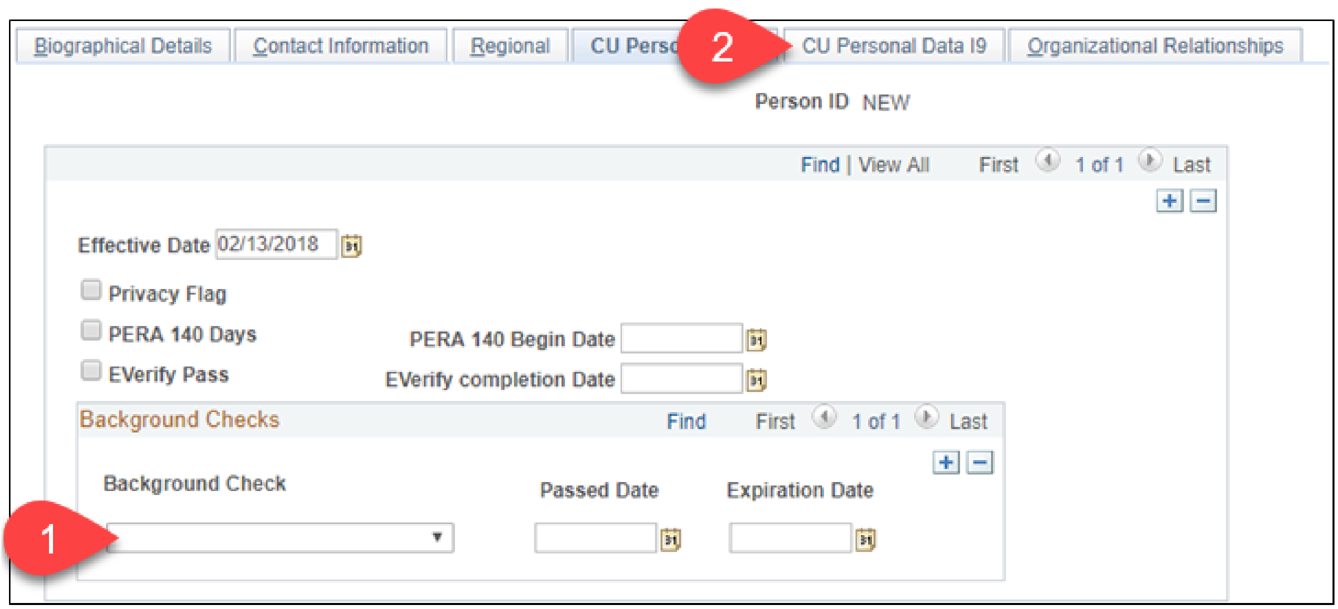
Entering Regional Information

From the Regional tab, you can enter information about the POI, but it is not required to create a new POI.

1. Enter **Ethnic Group** if applicable. If you do not have this information, leave this field blank.
2. Enter **Military Status** if applicable. If you do not have this information, leave this field blank.
3. Click the **CU Personal Data** tab.

Entering CU Personal Data

1. Enter **Background Check** information, if applicable. If you do not have this information, leave this field blank.
2. Click the **CU Personal Data I9** tab.

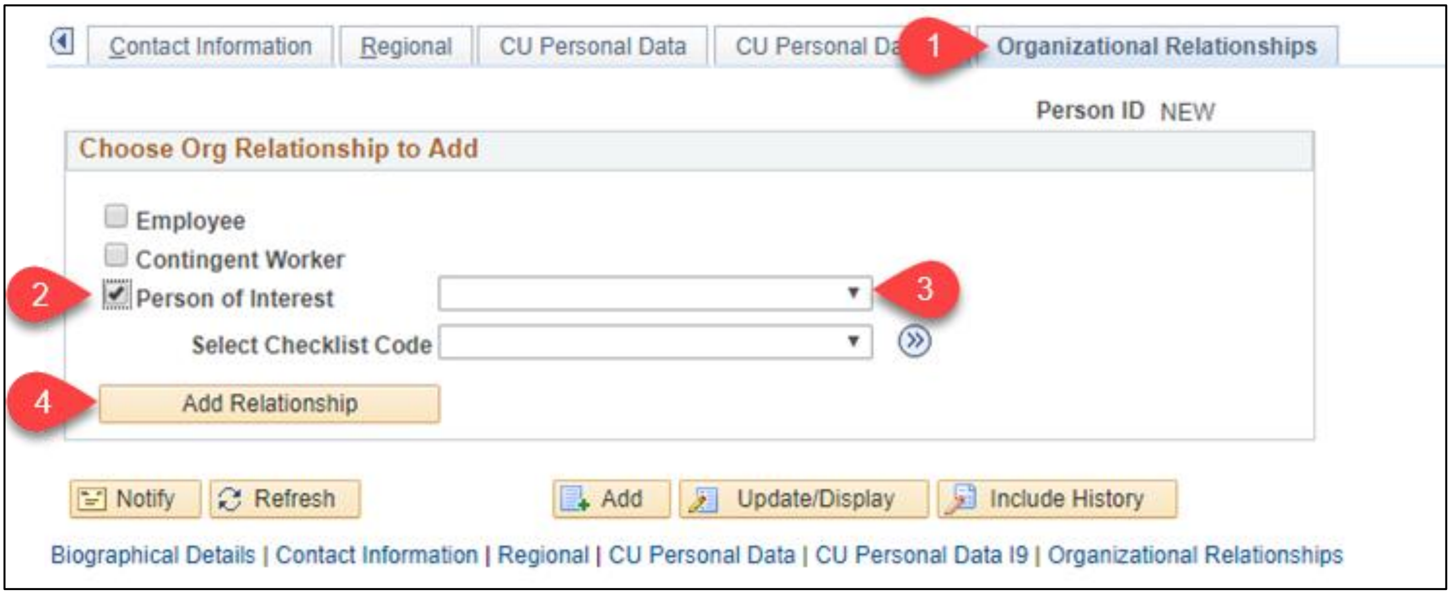


Entering CU Personal Data I9

If you are entering a POI with a Security (00015) or Pre-Employment (00013) type, who is International and waiting on their SSN, you must select one of the **U.S. Citizen or Legal Permanent Resident** options. For all other POI types, you can skip this tab.

Entering Organizational Relationships

After entering the personal information, the final tab will let you define the POI's organizational relationship, which includes defining what type of access this POI has and who the POI's sponsor is.



1. Click the **Organizational Relationships** tab.
2. Select the **Person of Interest** box.
3. From the drop-down list, select a POI Type.
4. Click **Add Relationship**. The Add a POI Relationship page appears.

Defining Security Access and POI Sponsor

From the Add a POI Relationship page, you can complete creating your POI.

Adding a Person of Interest

From the Add a Person of Interest tab, two lines appear in the Security Data section: Business Unit and Department. Both of these are required to successfully create a POI.

1. In the **Business Unit** field, select or type the Campus business unit.

   Warning: Do not use UCOLO for Business Unit.

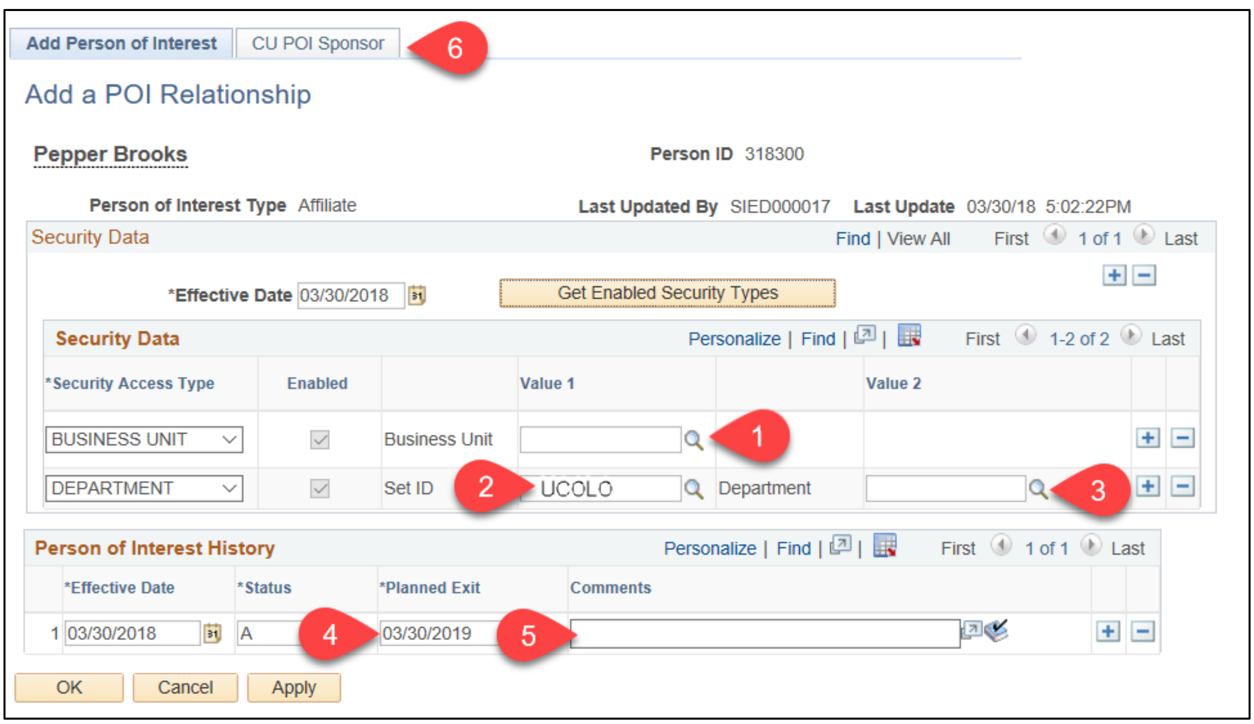
2. Allow the value for **Set ID** to default to **UCOLO**.
3. In the **Department** field, select or type the department.

   Note: You can use the look up (magnifying glass) to search for available options.

4. **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.

5. Enter **Comments** as necessary.
6. Click the **CU POI Sponsor** tab.

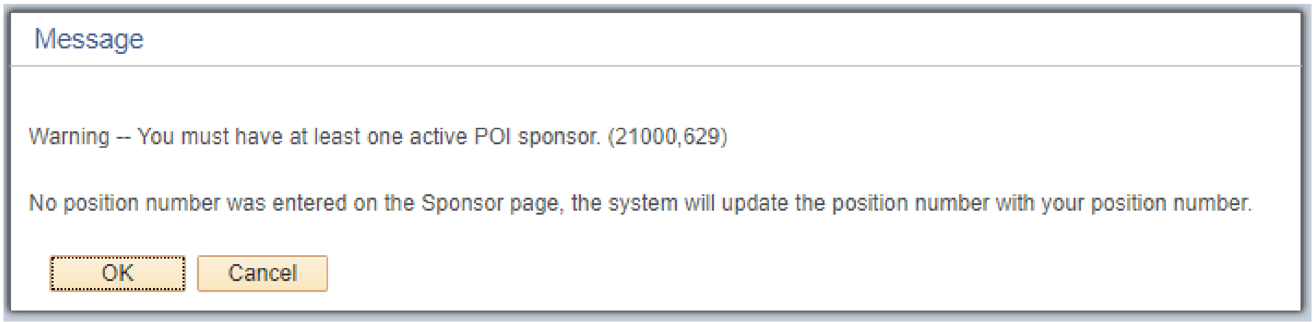


Entering the POI's Sponsor

A POI Sponsor is required. You must enter sponsor information before leaving this page. If you do not know who the sponsor should be, contact your Campus HR (Denver/Anschutz: contact your School/College/Department HR).

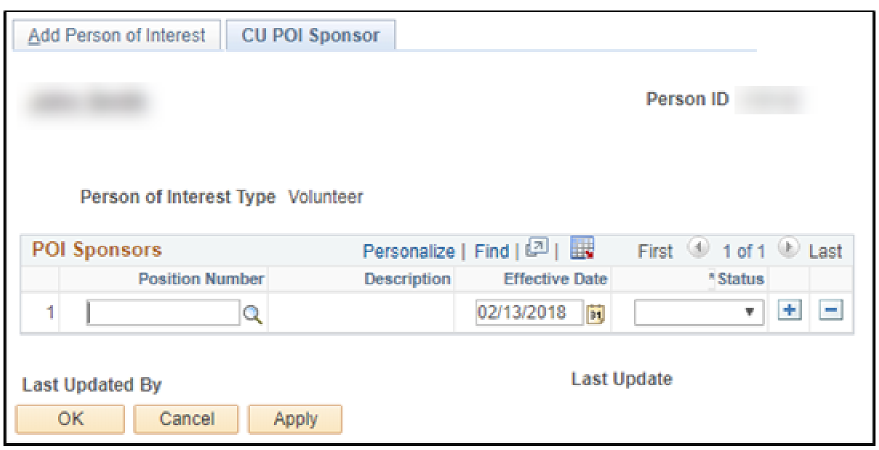
1. In the **Position Number** field, type the position number of the POI's sponsor. You can use the look up to search for and select the position number. After you select the position number, the system displays the position's title.

   If you do not enter a sponsor's position number, you will receive a warning message:

   Click **OK** and your position number will be entered. Once you obtain the sponsor's position number, you can update it as described in *Maintaining a POI Relationship Step-by-Step Guide*.

2. Enter the **Effective Date**.
3. From the **Status** list, select **Active**. A POI must have an active sponsor at all times.
4. Review all entries on both tabs for accuracy.
5. Click **OK.**

   After you click **OK**, the system returns you to the previous page. HCM has assigned a new **Person ID**. You can review data you entered on these tabs.

6. After you have reviewed for accuracy, click **Save**.