

Human Capital Management: Step-by-Step Guide

Identifying POI Records for Extended Expiration

An update to HCM is going to include a POI Mass Termination Process. This process terminates those persons of interest (POIs) with planned exit dates that have expired. You may have POIs whom you want to extend the planned exit date so that their records are not terminated.

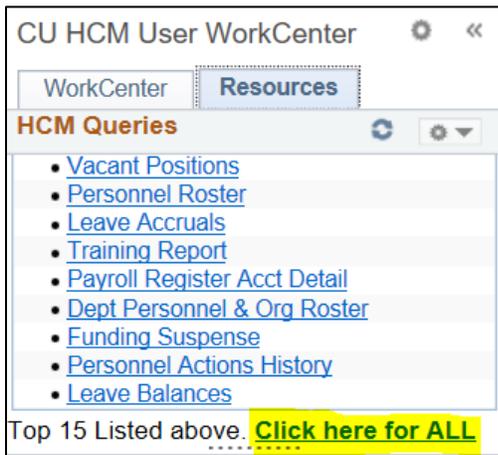
This guide describes how to:

- Run a query to identify active POI records with expired exit dates.
- Review the results of the query.
- Update those POI records that you do not want terminated.

Running a Query to Identify Active POI Records

To run the POI query:

1. From the **CU HCM User Workcenter**, click the **Resources** tab. Query Manager lists the 15 most frequently run queries.
2. Scroll down to display a list of queries available to all HCM users and click **Click here for ALL**.



A list of all HCM user queries appears to the right of the Workcenter.

3. Click **POI Report** (CUES_HCM_POI_REPORT).
4. Type the **Department** number and **A** (for Active) as shown in the fields highlighted below.

5. Click **View Results** to run the query.

HCM displays all active POIs for the department, similar to the image below:

CUES_HCM_POI_REPORT - POI Report

Department (Optional)

A=Active, I=Inact, Blank=All

POI Type - Blank=All

POI Last Name (Optional)

POI First Name (Optional)

First Planned Exit (Optional)

Last Planned Exit (Optional)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (521 kb)

View All First 1-100 of 703

	POI Empl ID	POI Last Name	POI First Name	POI Middle Name	POI Type	POI Type Descr	Eff Date	Planned Exit	Default Flag	POI Status	Dept ID	Dept Name	Updated By	Sponsor Name	Sponsor Email
1	231979	Ackerman	Ashleigh	Jean	00013	Pre-Employment	05/05/2011	05/05/2012		Active	10018	AthlBusAff B00301	Patzer,Tanya Marquart	tanya.patzer@Colorado.EDU	
2	258533	Adam	John	Michael	00013	Pre-Employment	08/26/2013	08/26/2014		Active	10018	AthlBusAff PATZ000016	Patzer,Tanya Marquart	tanya.patzer@Colorado.EDU	
3	251059	Adams	Klayton	Tanner	00013	Pre-Employment	12/21/2013	12/21/2013		Active	10018	AthlBusAff TRIP000072	Tripp,Tracy Ann	Tracy.Tripp@Colorado.EDU	
4	254216	Aguero	Amanda	N.	00013	Pre-Employment	04/29/2013	04/29/2014		Active	10018	AthlBusAff PATZ000016	Patzer,Tanya Marquart	tanya.patzer@Colorado.EDU	
5	232023	Aguilera	David	C.	00013	Pre-Employment	05/05/2011	05/05/2012		Active	10018	AthlBusAff B00301	Patzer,Tanya Marquart	tanya.patzer@Colorado.EDU	
6	280546	Aiello	Alexandra	M	00020	Volunteer	07/06/2015	07/06/2016		Active	10018	AthlBusAff TRIP000072	Tripp,Tracy Ann	Tracy.Tripp@Colorado.EDU	
7	289236	Aldridge	Amanda	P	00020	Volunteer	01/26/2016	01/26/2017		Active	10018	AthlBusAff TRIP000072	Tripp,Tracy Ann	Tracy.Tripp@Colorado.EDU	
8	233506	Alexis	Emily	Anne	00013	Pre-Employment	06/15/2011	06/15/2012		Active	10018	AthlBusAff B00301	Patzer,Tanya Marquart	tanya.patzer@Colorado.EDU	
9	108913	Allen	Theodore	Michael	00020	Volunteer	09/17/2014	09/17/2015		Active	10018	AthlBusAff TRIP000072	Tripp,Tracy Ann	Tracy.Tripp@Colorado.EDU	
10	173047	Almaraz	Adrienne	M	00013	Pre-Employment	04/15/2011	04/15/2012		Active	10018	AthlBusAff B00301	Patzer,Tanya Marquart	tanya.patzer@Colorado.EDU	
11	232179	Amaya	Rafael	E.	00013	Pre-Employment	05/12/2011	05/12/2012		Active	10018	AthlBusAff B00301	Patzer,Tanya Marquart	tanya.patzer@Colorado.EDU	

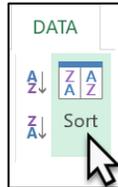
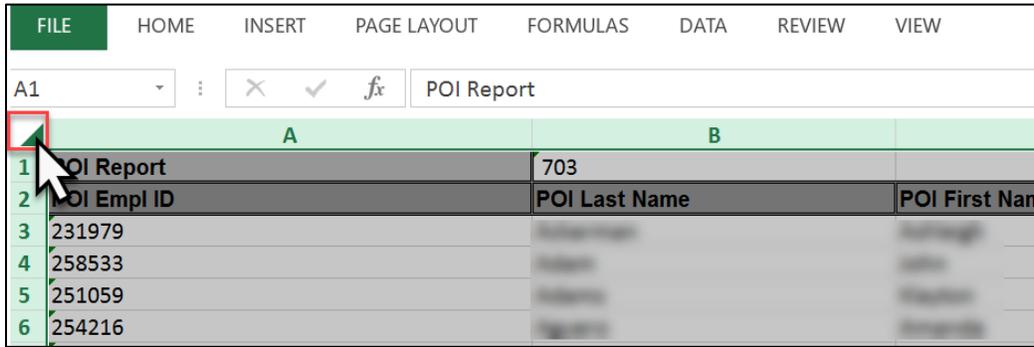
Downloading Query Results

To download results to Excel spreadsheet:

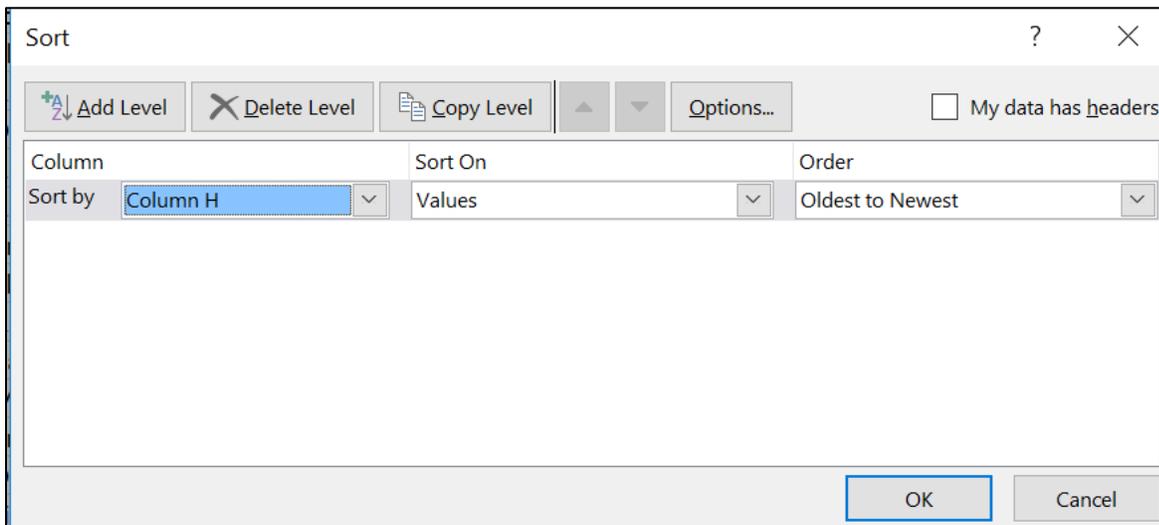
1. Click **Excel Spreadsheet**. Microsoft Excel opens a spreadsheet with your results displayed in Protected View.

2. Click **Enable Editing** at the top of the page.

3. Select the contents of the spreadsheet.



4. From the **Data** menu, select **Sort**. The Sort dialog box appears.
5. From the **Sort by** list, select **Column H**, which contains the Planned Exit date. Oldest to Newest should appear selected under the Order; leave this value so that expired Planned Exit dates will be listed first.
6. Click **OK**.



Review the spreadsheet for any POIs that have expired Planned Exit dates that need to be extended. POIs with expired Planned Exit dates will be inactivated when the POI Mass Termination Process is run.

Use an ePAR POI with the Maintain POI option to extend the Planned Exit date as described in the following section.

Extending the POI Planned Expiration Date

To extend the Planned Exit date for a POI:

1. Navigation: **Main Menu > Smart Solutions > Document Framework > Document Collection.**
2. Select the **Smart ePAR Non-Pay Actions** tab, if it is not already displayed.
3. Under **ePAR POI**, click **Add**. The Create ePAR POI Request page appears.
4. Under **Select POI Areas**, make sure the **Maintain POI** option is selected.

5. Type the **Empl ID** and click **Search**. The Search Results appear with your POI selected.
6. Click **Next**. The system may display some informational messages for which you can click **OK**. The Step 2 of 3 page appears.
7. If the POI has more than one POI type, be sure to enter different **Effective Dates** so the transactions will not go into Error status.
8. Click **Next**. The system may display some informational messages. The Step 3 of 3 page appears, displaying sections for Current POI Data and New POI Data.
9. In the New POI Data section, type a new **Planned Exit** date.

Security Access Type	Enabled	Value 1	Value
BUSINESS UNIT	<input checked="" type="checkbox"/>	UCB	
DEPARTMENT	<input checked="" type="checkbox"/>	UCOLO	Department 10018

10. Click **Save**.

Checking Your Work

Run the POI Report again to make sure the people you have extended are no longer appearing as expired.