8.9 HRMS Step by Step Guide
POI Lookup - Workforce Administration Module

Overview: This guide provides instruction on looking up a Person (POI) who is affiliated with the University. A POI may have multiple affiliations, as well as a paying job with CU.

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

There are three ways to look up and modify POI information. The information needed will determine which way you access the POI data.

- **Maintain a Person's POI Reltn:**
  Navigation: Home / Workforce Administration / Personal Information / Organizational Relationships / Maintain a Person's POI Reltn
  Use this component to research or update a POI's description, sponsoring department, department contact information and POI begin and planned exit dates. *See Update/Inactivate POI Relationship step-by-step guide for instructions on how to update POI data.*

- **Person Organizational Summary:**
  Navigation: Home / Workforce Administration / Personal Information / Person Organizational Summary
  Use this component to research a POI's affiliation type(s) (and employment instances, if applicable) and begin and planned exit dates.

- **Modify a Person:**
  Navigation: Home / Workforce Administration / Personal Information / Modify a Person
  Use this component to research or update a POI's personal information, such as name, department, campus box, social security number, home and mailing addresses, phone numbers and email addresses. *See Update Address, Update Department and Campus Box, Update Misc., Phone, Email, and Update Name step-by-step guides for instructions on how to update POI data.*

  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.
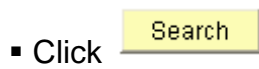
Maintain a Person's POI Reltn:

1. Navigate to the Maintain a Person's POI Reltn page - Workforce Administration - Personal Information - Organizational Relationships - Maintain a Person's POI Reltn	

2. Maintain POI Types search page displays

- Enter one or more of the search fields

- Click [Search]

Maintain POI Types

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

Find an Existing Value

EmplID:	begins with ⌄	195717
Person of Interest Type:	begins with ⌄	🔍
Name:	begins with ⌄	

[Search] [Clear]   Basic Search 💾 Save Search Criteria

3. Search Results displays, if more than one POI 'appointment'

- To view both POI appointments click each POI Type link

  - Click a POI Type (in this example, 00015)

Maintain POI Types

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

Find an Existing Value

EmplID:	begins with ⌄	195717
Person of Interest Type:	begins with ⌄	🔍
Name:	begins with ⌄	

[Search] [Clear]   Basic Search 💾 Save Search Criteria

Search Results

View All   First ◄ 1-2 of 2 ► Last

EmplID	Person of Interest Type	Name
195717	00015	da Vinci, Leonardo
195717	00020	da Vinci, Leonardo

4. Edit POI Relationship page displays for POI Type 00015

- POI Type is Security Access in Employee Services

- Note the most recent status of POI appointment is ' I ' (Inactive)

- Click [Return to Search]

Edit POI Relationship

da Vinci, Leonardo   **Emplid:**   195717

Person of Interest Type: Security Access
POI Description: HRMS CONSULTANT

Sponsoring Department: 51000   🔍   Payroll & Benefit Services
Originally entered by: Wu,Stefan   **Current Contact**   190023   🔍 Wu,Stefan
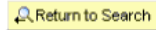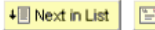   190023

Security Data   Find | View All   First ◀ 1 of 1 ▶ Last

Effective Date: 09/01/2007

     Customize | Find | 🗓   First ◀ 1 of 1 ▶ Last   ➕ ➖

Security Access Type	Enabled		Value 1	Value 2
BUSINESS UNIT	☑	Business Unit	UCOLO	

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

	*Effective Date	*Status	Planned Exit	More Information		
1	09/24/2007 📅	I 🔍	09/24/2007 📅	rec'd full-time employ w/PBS ✎	➕	➖
2	09/01/2007 📅	A 🔍	09/01/2008 📅	✎	➕	➖

[💾 Save] [🔍 Return to Search] [⬆ Previous in List] [⬇ Next in List] [📧 Notify] [🔄 Refresh] [📝 Update/Display] [📄 Include History] [📝 Co...

5. Maintain POI Types search page displays

- Click another POI Type (in this example, 00020)

Maintain POI Types

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

Find an Existing Value

EmplID: begins with ▾   195717

Person of Interest Type: begins with ▾   00015   🔍

Name: begins with ▾

[Search]   [Clear]   Basic Search   💾 Save Search Criteria

Search Results

View All   First ◀ 1-2 of 2 ▶ Last

EmplID	Person of Interest Type	Name
195717	00015	da Vinci, Leonardo
195717	00020	da Vinci, Leonardo

6. Edit POI Relationship page displays for POI Type 00020

- POI Type is Volunteer in Dept of Atmos & Oceanic Science

- Note the status of POI appointment is ' A ' (Active)

Edit POI Relationship

da Vinci, Leonardo   **Emplid:**   195717

Person of Interest Type: Volunteer
POI Description: ASSISTING INSTRUCTOR

Sponsoring Department: 10189   🔍   Dept of Atmos & Oceanic Sci

Originally entered by: Wu,Stefan   **Current Contact** 190024 🔍 Cunningham,Stephanie
                    190023   303/123-4567

Security Data   Find | View All   First ◀ 1 of 1 ▶ Last

Effective Date: 09/28/2007

                                                Customize | Find | 🖩   First ◀ 1 of 1 ▶ Last

Security Access Type	Enabled		Value 1	Value 2
BUSINESS UNIT	☑	Business Unit	UCOLO	

Person of Interest History   Customize | Find | 🖩   First ◀ 1 of 1 ▶ Last

	*Effective Date	*Status	Planned Exit	More Information		
1	09/28/2007 📅	A 🔍	09/28/2008 📅		➕	➖

End Maintain a Person's POI Reltn search

Person Organizational Summary

1. Navigate to the Person Organizational Summary page

- Workforce Administration
- Personal Information
- Person Organizational Summary

2. Person Organizational Summary page displays

- Enter one or more of the search fields

- Click **Search**

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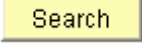
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

EmplID: begins with [v] 222158

Name: begins with [v] [____]

Last Name: begins with [v] [____]

Alternate Character Name: begins with [v] [____]

☑ Include History ☐ Correct History

Search   Clear   Basic Search   💾 Save Search Criteria

Find an Existing Value | Add a New Value

3. Person Org Summary page displays

- Assignments section:
  - Displays CU employment status

- Person of Interest Instance section:
  - Displays POI type history for employee (in this example, "Other POI Type – Active")

Person Org Summary

Woodman, Tin   Person ID: 222158

▽ **Employment Instances**   Find | View All   First ◄ 1 of 1 ► Last

ORG Instance: 0   Last Hire: 06/01/2010   Termination Date:
HR Status: Active   Payroll Status: Active

Assignments   Customize | Find | ⊞   First ◄ 1 of 1 ► Last

Empl Rcd#	Home/Host	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Last Asgn Start	Term Date
0	Home	Active	Active	06/15/2010	UCOLO	51000	06/01/2010	

▽ **Person of Interest Instance**

                                               Customize | Find | ⊞   First ◄ 1 of 1 ► Last

Person of Interest Type	Empl_rcd#	Status	Begin Date/	End Date
Other		Active	05/15/2010	05/15/2011

🔍 Return to Search   📧 Notify

End Person Organizational Summary search

Modify a Person

1. Navigate to the Modify a Person page

- Workforce Administration
- Personal Information
- Modify a Person
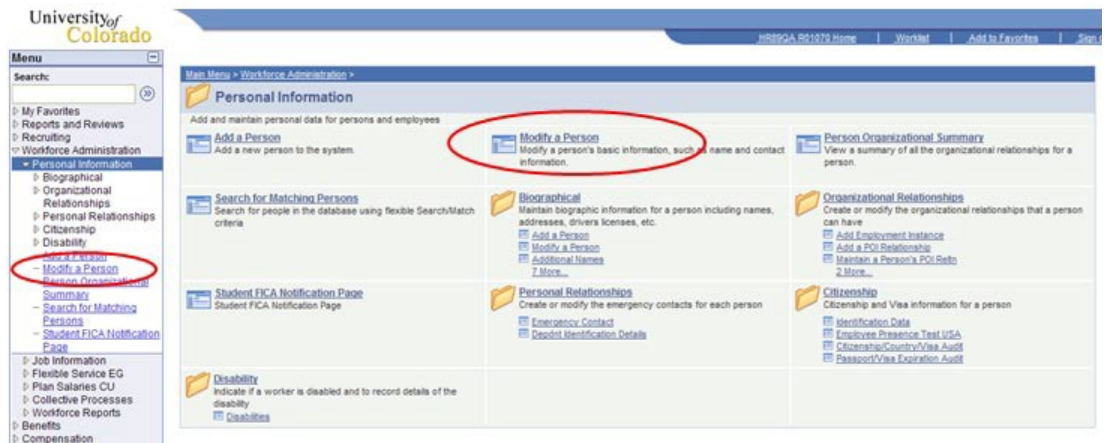
2. Modify a Person / Personal Information search page displays

- Enter one or more of the search fields

- Click Search

Personal Information

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

Find an Existing Value | Add a New Value

EmplID:	begins with	222158
Name:	begins with	
Last Name:	begins with	
Alternate Character Name:	begins with	

☑ Include History   ☐ Correct History

Search   Clear   Basic Search 🖫 Save Search Criteria

Find an Existing Value | Add a New Value

3. Personal Information - Biographical Details page displays

(NOTE: No POI / Employee status information is given in the Personal Information section)

▪ Click [Contact Information]

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

Person ID: 222158   Woodman,Tin

Primary Name   Find | View All   First ◄ 1 of 1 ► Last

Effective Date:	05/15/2010	⊞ ⊟
Format Type:	English	
Display Name:	Woodman, Tin View Name	

Biographic Information

*Date of Birth: 07/04/1945 📅   65 Years 1 Months   Date of Death: [ ] 📅

Birth Country: USA 🔍   United States

Birth State: [ ] 🔍

Birth Location: [ ]   Waive Data Protection ☐

Biographical History   Find | View All   First ◄ 1 of 1 ► Last

*Effective Date: 06/01/2010 📅   ⊞ ⊟

*Gender: Male ▾

*Highest Education Level: A-Not Indicated ▾

*Marital Status: Married ▾   As of: 06/01/2010 📅

Language Code: [▾]

Alternate ID: [ ]

☐ Full-Time Student

▽ **National ID**   Customize | Find | View All | ⊞   First ◄ 1 of 1 ► Last

*Country	*National ID Type	National ID	Primary ID	
USA 🔍	Social Security Number ▾	999-99-9905	☑	⊞ ⊟

[💾 Save] [🔍 Return to Search] [📧 Notify] [⬅ Previous tab] [➡ Next tab] [📄 Update/Display] [📄 Include History] [📝 Correct History]

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

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4. Contact Information page displays

▪ Review and update information as needed

▪ Click [Regional]

Biographical Details | **Contact Information** | Regional | Dept Information/Verifications

Woodman, Tin   Person ID: 222158

Current Addresses   Customize | Find | View All | ⊞   First ◄ 1-2 of 2 ► Last

Address Type	As Of Date	Status	Address		
Home	09/01/2007	A	123 Artist Lane Boulder, CO 80303	View Address Detail	⊞ ⊟
Mailing	09/01/2007	A	123 Artist Lane Boulder, CO 80303	View Address Detail	⊞ ⊟

Emergency Contact

Phone Information   Customize | Find | ⊞   First ◄ 1-3 of 3 ► Last

*Phone Type	Telephone	Extension	Preferred	
Cellular ▾	303/555-5555	[ ]	☐	⊞ ⊟
Campus 1 ▾	303/333-3333	[ ]	☑	⊞ ⊟
Home ▾	303/444-4444	[ ]	☐	⊞ ⊟

Email Addresses   Customize | Find | ⊞   First ◄ 1 of 1 ► Last

*Email Type	*Email Address	Preferred	
Campus ▾	Tin.Woodman@cu.edu	☑	⊞ ⊟

[💾 Save] [🔍 Return to Search] [📧 Notify] [⬅ Previous tab] [➡ Next tab]

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5. Regional page displays

- Review and update information

- Click
  [Dept Information/Verifications]

| Biographical Details | Contact Information | **Regional** | Dept Information/Verifications |

Woodman, Tin   Person ID: 222158

▼ 🇺🇸 USA

Ethnic Group   Find | View All   First ◄ 1 of 1 ► Last

Regulatory Region: USA 🔍 United States   Ethnic Group: NSPEC 🔍   Chose not to Disclose   ➕ ➖

☑ Primary

History   Find | View All   First ◄ 1 of 1 ► Last   ➕ ➖

Effective Date: 05/15/2010 📅

Date Entitled to Medicare: ⬜ 📅   Military Status: ⬜ ▼

Citizenship (Proof 1): ⬜   Citizenship (Proof 2): ⬜

☑ Eligible to Work in U.S.

Smoker History   Customize | Find | 🗐   First ◄ 1 of 1 ► Last

	Smoker		As of		
1	Yes			➕	➖

[💾 Save] [🔍 Return to Search] [📧 Notify] [⬅ Previous tab] [➡ Next tab]   [📄 Update/Display] [📄 Include History] [📝 Correct History]

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

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6. Dept Information/
7. Verifications page displays

- Review and update information

| Biographical Details | Contact Information | Regional | **Dept Information/Verifications** |

Woodman, Tin   Person ID: 222158

Find | View All   First ◄ 1 of 1 ► Last

Effective Date 05/15/2010 📅   ⬜ Privacy Flag   ⬜ FERPA   ➕ ➖

Home Department 51000 🔍   Payroll & Benefit Services

Campus Box 575 SYS 🔍   Payroll & Benefit Services   [Add to SkillPort]

Employment Eligibility Proof	**Background checks**
Soc. Sec. Card Copy Received ⬜ 📅	⬜ Criminal History Records ⬜ 📅
I-9 Effective Date ⬜ 📅	⬜ Financial History Records ⬜ 📅
I-9 Expiration Date ⬜ 📅	⬜ Motor Vehicle Records ⬜ 📅
EmplID ⬜ 🔍 Name	⬜ Other Background Check ⬜ 📅
⬜ EVerify Pass	
EVerify Completion Date ⬜ 📅	

[💾 Save] [🔍 Return to Search] [📧 Notify] [⬅ Previous tab] [➡ Next tab]   [📄 Update/Display] [📄 Include History] [📝 Correct History]

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

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End Modify a Person search

POI Lookup complete