



**HCM 8.9 Business Process Guide
CSU ID Search and
Add a Person of Interest (POI) for APS**

Last Revised:

9/4/2008



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REVISION CONTROL

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Introduction

To create a Temporary Faculty Contract, a personal data record and an Empl ID (employee ID) must exist in PeopleSoft. If the temporary faculty member does not already have a record in PeopleSoft, one must be created. The first step in this process is the **CSU ID Search**. It is critical that a thorough search of the database be done to avoid creating duplicate IDs and multiple records.

This Business Process Guide describes both the search process and the **Add a Person of Interest** process that allows you to create the PeopleSoft record and an Empl ID. Through this process, you are creating part of the temporary faculty member’s personal data record in PeopleSoft. The remaining information needed to complete the personal data record will be entered by Payroll at the time of the appointment process.



Processing Steps

CSU ID Search

Navigation: *Main Menu - CSUID Search*

Processing Steps	Screen Shot																																																													
<p>1) Enter Social Security Number in the National ID field.</p> <p>2) Click Search.</p> <ul style="list-style-type: none"> ▪ If no results display, no Empl ID exists in PeopleSoft. ▪ Go to Add a Person to create the Personal Data record and the Empl ID. ▪ If results display from the search (the person already has a Personal Data record), go to CSU Contract Data to create a contract, or click Reset to search for another person. ▪ Note that there is a separate line for each Organizational Relationship, e.g. Employee, POI-Future Hire, POI-Campus Solutions (student). 	<p>CSU ID Search</p> <p>Search [] Reset []</p> <p>EmplID: []</p> <p>National ID: 258741369</p> <p>Applicant ID: []</p> <p>First Name: []</p> <p>Last Name: []</p> <p>Search [] Reset []</p> <table border="1"> <thead> <tr> <th></th> <th>Detail</th> <th>Name</th> <th>EmplID</th> <th>Natl ID (Last 4)</th> <th>Applicant ID</th> <th>DOB (mm.dd)</th> <th>Org Rel</th> <th>Classification</th> <th>POI Type</th> <th>HR Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Detail</td> <td></td> <td></td> <td></td> <td></td> <td>00/00</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>CSU ID Search</p> <p>Search [] Reset []</p> <p>EmplID: []</p> <p>National ID: 446225998</p> <p>Applicant ID: []</p> <p>First Name: []</p> <p>Last Name: []</p> <p>Search [] Reset []</p> <table border="1"> <thead> <tr> <th></th> <th>Detail</th> <th>Name</th> <th>EmplID</th> <th>Natl ID (Last 4)</th> <th>Applicant ID</th> <th>DOB (mm.dd)</th> <th>Org Rel</th> <th>Classification</th> <th>POI Type</th> <th>HR Status</th> <th>Empl Rcd Nbr</th> <th>Jo Ct</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Detail</td> <td>Plath, Sylvia</td> <td>010025623</td> <td>5998</td> <td></td> <td>01/14</td> <td>Employee</td> <td>Temp 3 Year</td> <td></td> <td>Active</td> <td>0</td> <td>23</td> </tr> <tr> <td>2</td> <td>Detail</td> <td>Plath, Sylvia</td> <td>010025623</td> <td>5998</td> <td></td> <td>01/14</td> <td></td> <td></td> <td>Future Hire</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Detail	Name	EmplID	Natl ID (Last 4)	Applicant ID	DOB (mm.dd)	Org Rel	Classification	POI Type	HR Status	1	Detail					00/00						Detail	Name	EmplID	Natl ID (Last 4)	Applicant ID	DOB (mm.dd)	Org Rel	Classification	POI Type	HR Status	Empl Rcd Nbr	Jo Ct	1	Detail	Plath, Sylvia	010025623	5998		01/14	Employee	Temp 3 Year		Active	0	23	2	Detail	Plath, Sylvia	010025623	5998		01/14			Future Hire			
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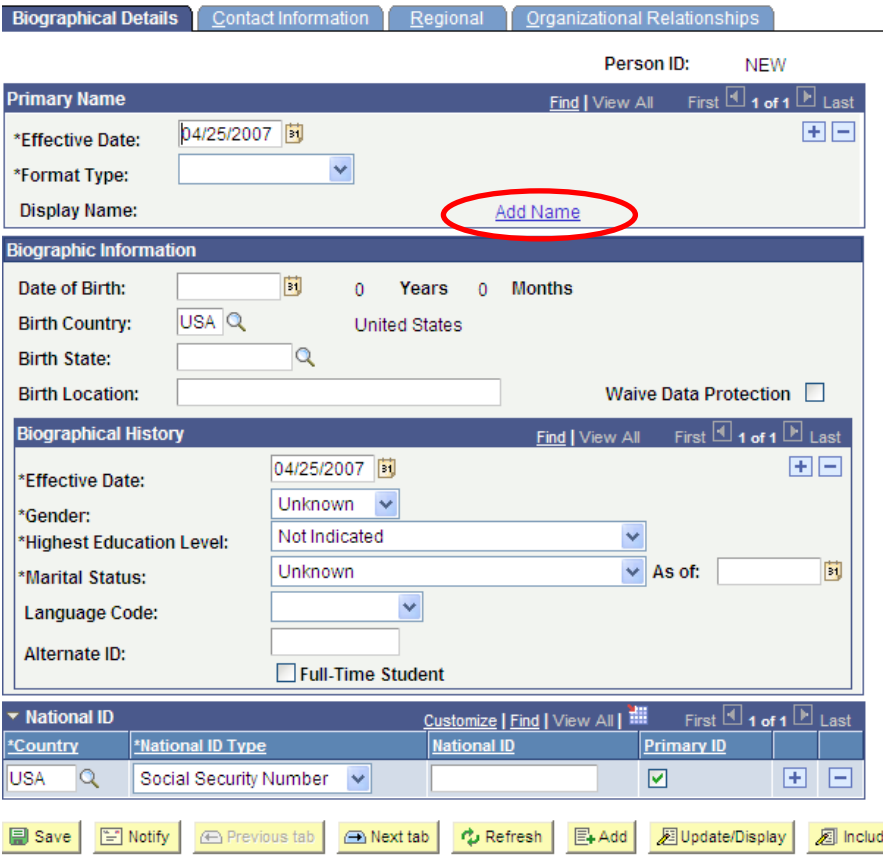
Add a Person

Navigation: *Workforce Administration > Personal Information > Add a Person*

Processing Steps	Screen Shot
<p>Note: There is a link to CSU ID Search – in case you forgot to SEARCH first.</p> <ol style="list-style-type: none"> 1) Accept the default of NEW 2) Click Add the Person. 	

Biographical Details

Navigation: *Workforce Administration > Personal Information > Add a Person > Biographical Details tab*

Add a Person	Screen Shot
<p>NOTE: The only personal data fields that you will complete are:</p> <ul style="list-style-type: none"> • Effective Date • Name • Birthdate • SSN • Email address <ol style="list-style-type: none"> 3) Accept the Effective Date default - the current date. <ul style="list-style-type: none"> ▪ CAUTION: The effective date on the Personal Data record must be a date <u>prior</u> to the effective date on the contract, e.g. for a contract effective 8/17/2007, the Personal Record effective date must be no later than 8/16/2007. This is only an issue if you are adding temporary faculty after the start of the semester. 4) Click Add Name. 	

Primary Name

Processing Steps	Screen Shot
<p>Note: the Prefix is left blank.</p> <p>5) Enter the first and last names.</p> <p>6) Click OK to return to the Biographical Details page.</p>	

Biographic Information

Processing Steps	Screen Shot
<p>7) In the <i>Biographic Information</i> section, enter the Date of Birth. (This is required to create an HSU User ID.)</p>	

National ID

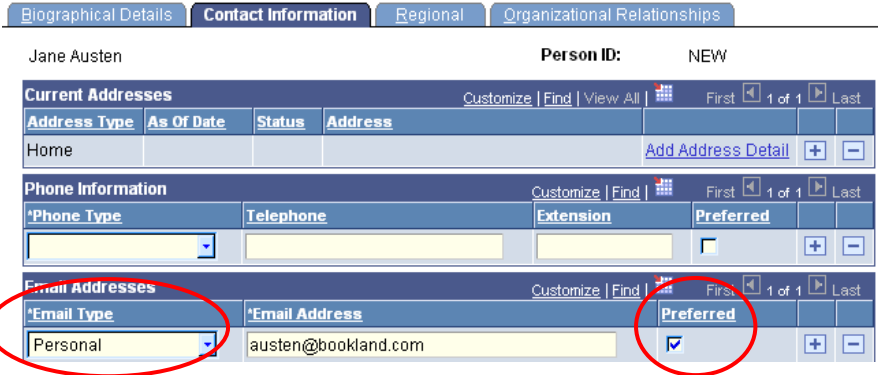
Processing Steps	Screen Shot
<p>8) In the <i>National ID</i> section, enter the Social Security Number in National ID field. This will default as the Primary ID.</p> <ul style="list-style-type: none"> Go to the Contact Information tab. 	



Contact Information

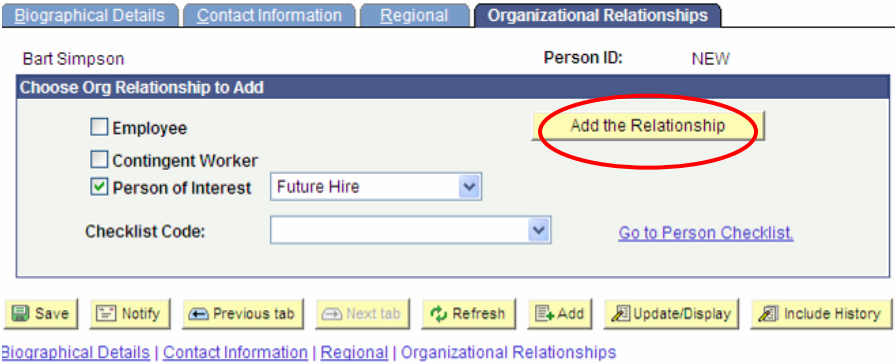
Navigation: Click on the *Contact Information* tab.

Email Addresses

Processing Steps: Information	Screen Shot
<p>9) In the <i>Email Addresses</i> section, use the drop down list to select Personal as the Email Type. (<i>The type must be Personal for the User ID creation process.</i>)</p> <p>10) Enter the <u>full</u> Email Address.</p> <ul style="list-style-type: none"> ▪ Check the Preferred box. ▪ Skip the Regional tab. ▪ Go to the Organizational Relationships tab. 	 <p>Some error messages regarding email address formatting: <i>"Email address must contain the @ character."</i> <i>"The e-mail address shall not contain @ as the last character"</i> <i>"The e-mail address shall contain the '.' Character after the host name"</i></p>

Organizational Relationship

Navigation: Click on the *Organizational Relationships* tab.

Processing Steps	Screen Shot
<p>On this page you will create the "Person of Interest" Organizational Relationship and generate the Empl ID.</p> <ol style="list-style-type: none"> 1) Check Person of Interest. 2) Use the drop down list to select Future Hire. 3) Click Add the Relationship. <p>A warning message will appear: "Warning: At least one Address field must be populated in order to save the address (1000,542)" IGNORE this message and click OK to continue.</p>	



Add a Person of Interest

Processing Steps	Screen Shot
<p>4) In the Security Access Type field, use the drop down list to select POI Department.</p> <ul style="list-style-type: none"> The Enabled field is automatically checked. <p>5) In the Set ID field, enter HMCMP.</p> <p>6) In the Department field, enter your department ID number.</p> <p>7) Enter a date in the Planned Exit box: 10/1/xxxx for Fall appts 2/1/xxxx for Spr appts 8/1/xxxx for Summer appts. (The nightly process that creates HSU user IDs requires a date to be entered into this field.)</p> <p>8) Click OK to return to the Organizational Relationships page.</p> <p>Note: The Add the Relationship button “grays out” – it is no longer available for this record.</p> <p>9) Click Save. Note that the Person ID (Empl ID) is created.</p> <p>Go to CSU Create Contract or click the Add button to add another person record.</p>	