POI Process Review, Demonstration & Discussion

Presented by: University Personnel

June 16, 2022

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Agenda

- Zoom Recording / Audio Transcript
  - Passcode: ?KR6Hy#$
- Introductions
- POI Types, Forms and Who Does What
- Tips for Faster Processing
- PeopleSoft Demonstration
- Training and Help
- Q & A
- Wrap Up

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Introductions

- Carrie Medders
  - Senior Director, Technology & Training
- Maggie Carrera
  - Coordinator, Online Training & Compliance
- Recruitment will be open soon for the Volunteer, POI and Compliance Assistant position

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POI Types

- CHRS Recruiting
- Future Hire
- Emeritus Faculty
- Emeritus Staff
- Volunteer Faculty
- Volunteer
- Visiting Scholar
- Other

- Auxiliaries
  - Alumni Association
  - Associated Students
  - Research Foundation
  - Spartan Shops
  - Student Union
  - Tower Foundation

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POI Types with No Forms

- CHRS Recruiting
  - No forms; added by UP recruiting staff when a non-employee (e.g. student, community member, etc.) is part of a recruitment committee

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POI Types with No Forms

- Future Hire
  - No forms; added via CHRS Recruiting integration process or manually by department admins and UP recruiting staff

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POI Types for Emeritus

- Emeritus Faculty
  - Initiated by Department
  - Reviewed by Faculty Services, Office of the Provost, President
  - Finalized by Office of the President
  - Entered by Employee Support Services

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POI Types for Emeritus

- Emeritus Staff
  - Initiated by Department
  - Reviewed by Dean/AVP, Division VP, UP Senior AVP, President
  - Finalized by Office of the President
  - Entered by Employee Support Services

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All Other POI Types

- General Requirements
  - Department initiates form
  - Most forms have to be acknowledge by supervisor, chair or work lead, dean or appropriate administrator
    - If direct supervisor will be supervising a minor, they are required to complete LiveScan fingerprinting
  - In some cases additional documents must be attached by the department

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All Other POI Types

- General Requirements
  - POI completes a portion of the form
    - Background check release
    - Vaccination proof acknowledgement
    - Eligibility to work information
    - Emergency contact

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All Other POI Types

- General Requirements
  - The UP Leave Team will ensure proper documentation is received if the POI will be accessing campus; they will not approve if not received in a timely manner (5 days from date of request)
  - Faculty Services will ensure faculty-related POIs have the proper credentials to do the work they're expected to do; they will not approve if the credentials are not adequate

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All Other POI Types

- General Requirements
  - The UP Volunteer Team will review eligibility to work documentation if required; they will not approve if the POI is not eligible to work in the United States
  - The UP Volunteer Team will initiate and monitor background checks if required; they will not approve if the POI does not clear the background check

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All Other POI Types

- General Requirements
  - UP is the final approval - all UP teams must approve in order for the POI to be appointed
    - Departments may NOT enter a POI until they receive the approved form from UP
    - Departments must adhere to the approved Start and End dates as indicated on the form by the UP Volunteer Team
    - Departments may only enter the POI approved; if another type of POI is needed another form must be submitted

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Volunteer Faculty

- Types of Work
  - Athletic Coaching
  - Counselor
  - Instructor
  - Leadership Coach
  - Lecturer
  - Librarian
  - Researcher

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Volunteer Faculty

- Process
  - Volunteer form initiated by Department
  - Acknowledged by Supervisor, Chair, Dean
  - Completed by Volunteer
  - Approved by
    - UP Leave Team
    - Faculty Services
    - UP Volunteer Team
    - If approved by all areas of UP, the form will be finalized and sent back to the department for processing
  - Entered by Department

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Volunteer (Non-Faculty)

- Types of Work
  - Advisor
  - Athletic Training Support
  - Driver
  - Event Support
  - Mentor
  - Office Support
  - Presenter/Speaker
  - Research/Lab Support
  - Student Supervisor
  - Tutor
  - Usher

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Volunteer (Non-Faculty)

- Process
  - Volunteer form initiated by Department
  - Acknowledged by Supervisor, Chair/Work Lead, Dean/Appropriate Administrator
  - Completed by Volunteer
  - Approved by
    - UP Leave Team
    - UP Volunteer Team
    - If approved by all areas of UP, the form will be finalized and sent back to the department for processing
  - Entered by Department

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Unpaid Visiting Scholar

- Type of Work
  - Typically a person affiliated with another institution who devotes gratis effort to SJSU while participating in a short-term educational, research, or other academic project in collaboration with SJSU faculty
  - Not compensated, but units or departments may cover some expenses for them
  - Different forms for international and domestic

Unpaid Visiting Scholar - International

- Process
  - Unpaid Visiting Scholar International form initiated by Department; portions of the ISSS approved packet must be attached
  - Acknowledged by Faculty Sponsor, Chair or Program Director, Dean
  - Completed by Scholar
  - Approved by
    - UP Leave Team
    - Faculty Services
    - UP Volunteer Team
    - If approved by all areas of UP, the form will be finalized
  - Entered by UP Volunteer Team

Unpaid Visiting Scholar - Domestic

- Process
  - Unpaid Visiting Scholar Domestic form Initiated by Department
  - Acknowledged by Faculty Sponsor, Chair or Program Director, Dean
  - Completed by Scholar
  - Approved by
    - UP Leave Team
    - Faculty Services
    - UP Volunteer Team
    - If approved by all areas of UP, the form will be finalized
  - Entered by UP Volunteer Team

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Unpaid Intern (POI Type: Other)

- Type of Work
  - An internship is a form of experiential learning that integrates knowledge and theory learned in the classroom with practical application and skills development in a professional setting
  - Internships give students the opportunity to gain valuable applied experience and make connections in professional fields they are considering for career paths; and give employers the opportunity to guide and evaluate talent
  - Interns may be paid, unpaid, or a combination of the two and are typically appointed for no more than one year
  - Interns may not perform bargaining unit work
  - A non-student may not be an intern

Unpaid Intern (POI Type: Other)

- Process
  - Intern form initiated by Department; PD must be attached
  - Acknowledged by Supervisor, Chair/Work Lead, Dean/Appropriate Administrator
  - Completed by Intern
  - Approved by
    - Advisor
    - UP Leave Team (coming soon*)
    - UP Volunteer Team
    - If approved by all areas of UP the form will be finalized and sent back to the department for processing
    - **Form will soon be updated to include vaccination proof process*
  - Entered by Department
    - Note: Intern must also sign the position description; signed PD should be sent to up-volunteer-appointments@sjsu.edu

Other POIs

- Type of Work/Reason for Appointment
  - These POIs may be employed by another entity (e.g. consulting firm, Chancellor's Office) but are doing work on campus (or remotely)
  - They may also be individuals who are not working on campus but need an ID for access to buildings and/or systems (e.g. housing residents, camp attendees)

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Other POIs

- Process
  - Person of Interest form initiated by Department
  - Acknowledged by Supervisor, Chair or MPP
  - Completed by POI
  - Approved by
    - UP Leave Team
    - UP Volunteer Team
    - If approved by all areas of UP the form will be finalized
  - Entered by UP Volunteer Team

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Tips for Faster Processing

- Do NOT retroactively appoint a POI in ANY category
- Submit form as early as possible
  - At least 2 weeks prior to preferred start date is best
    - Collecting vaccination proof may take up to 5 days
    - Getting background check results can take a week or more at times

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Tips for Faster Processing

- Be as detailed as possible about the work to be done (or why the POI/Other is needed)
  - The more details we have up front the less back and forth we have to do with you
- Ensure the POI stays on top of what is needed
  - Vaccination proof
  - Eligibility to work proof when applicable
  - Completion of background check when applicable

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Tips for Faster Processing

- Do not submit a duplicate form
  - If the first form wasn't right, VOID it then submit a new form
- The person submitting the form should be the person who will key the data in, typically a department admin
- If you're not sure which form to use, what to enter in certain fields, etc., contact up-volunteer-appointments@sjsu.edu

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PeopleSoft Demonstration

- Before we start the demo, a few reminders:
  - Always do a thorough CSU ID Search to avoid creating a duplicate EmplID
  - These fields are required in order to convert the POI to CHRS; these are required in CHRS
    - SSN or ITIN
    - Date of Birth
    - Planned Exit
  - Always key an inactive row (will not have to do this in CHRS)

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Training, Access and Help

- Training
  - Request POI-specific training via email up-volunteer-appointments@sjsu.edu
- System Access
  - Complete the SJSU @ Work and CHRS Recruiting System Access form (training required)
- Help
  - Find information on the UP Website
    - Process Toolkit/Onboarding
    - Resources/Forms & Documents
  - Contact us via email
    - up-volunteer-appointments@sjsu.edu

Q & A

- How does a POI get an email?
  - Once the POI is entered, either by UP or the department, the EmplID is created; a process will then run overnight to create SJSUOne and email accounts; depending on timing, it may take 2 days for this process to complete
  - The POI will need to activate their SJSUOne account and then they will be able to access email

Q & A

- How does a POI get a Tower Card?
  - The POI may upload a recent photo to: https://myid.sjsu.edu
  - The POI can then complete the SJSU Tower (ID) Card Mailing Request Form; a copy of the POI form is required
  - These forms are processed by the Tower Card Office
  - The POI can request that the card be mailed or picked up in person on campus

Q & A

- When will the POI get access to CSULearn?
  - Usually 2-3 days after the appointment has been entered in PeopleSoft but sometimes closer to a week
- Can we add POI types?
  - No, we are no longer allowed to add our own POI types due to the standardization of types for CHRS

Q & A

- What is the best place to access the Volunteer Request form? DocuSign template, UP website?
  - It is always best to find the updated forms on the UP website in the Onboarding section of the Process Toolkit or on our Forms page
- Are you accepting vaccine exemptions for POIs? And if so, do they also qualify for weekly testing on campus?
  - Exemptions are reviewed by UP staff; if approved, the POI is eligible for weekly testing; if not approved, the POI appointment will not be approved

Q & A

- What is the best way we can obtain the SSN or ITIN from the students (or other POIs)?
  - Getting the information over the phone is best but you can also use a Qualtrics form or ShareBase; CSU Moveit is also a safe option; if you are unable to obtain the information you can contact up-volunteer-appointments@sjsu.edu and we will assist you

Q & A

- Do we need to notify you if we need to end a volunteer appointment early? What about for other POIs that departments don't key?
  - For volunteers or interns that you keyed you don't need to notify us; you can key in the change yourself
  - For all other types that UP keys you should email up-volunteer-appointments@sjsu.edu with the updated information and we will update the record

Q & A

- Do folks who work for the on-campus food & beverage establishments, such as The Shop by Chef Baca in King Library, go through the POI process?
  - Yes, they are entered as Auxiliary-Spartan Shops

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Wrap Up

- Don’t hesitate to reach out with questions
  - up-volunteer-appointments@sjsu.edu
- Timeliness is key; patience is helpful
- Thank you for attending today’s session!