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SJSU | UNIVERSITY PERSONNEL

Introduction

Persons of Interest (POIs) are individuals connected to the University but not employed by SJSU. These individuals may be Volunteers, Faculty Volunteers, or Unpaid Visiting Scholars. They may also be individuals in auxiliary organizations or someone in another more general category ("Other") who needs access to SJSU systems. This includes unpaid Interns.

Volunteer, Faculty Volunteer, Unpaid Interns (Other), and Unpaid Visiting Scholar POIs are not to be entered without approval from University Personnel or, in the case of International Unpaid Visiting Scholars, International Student and Scholar Services.

Add a Person and Enter POI Information

A person who has no affiliation with SJSU, and therefore has no Employee ID, must first be added to the system as a person, then the POI can be connected to their record.

Complete a Search 1. Navigate: Main Menu > CSU ID Search 2. Enter as much information as you have for the person (A) 3. Click Search 4. Review the Results (B) to determine if your POI already exists on campus; if they do, please continue to the next section; if they are new, continue to the next step	
Add the Person 1. Navigate: Main Menu > Workforce Administration > Personal Information > Add a Person 2. Leave the Person ID as NEW (A) 3. Click Add the Person (B)	

Add the Name 4. Do not change the Effective Date unless you make it earlier than the current date (A) 5. If the Format Type is not English, select that value from the list 6. Click Add Name (B)	Biographical Details Contact Information Regional Organizational Relationships Person ID: NEW **Name** (A) Find | View All First ◀ 1 of 1 ▶ Last (B) *Effective Date: 07/29/2020 *Format Type: English Display Name: Add Name
Enter the Name 7. Add the First and Last Name (A) 8. Click OK (B)	**Edit Name** **English Name Format** (A) Prefix: First Name: Anastasia Middle Name: Last Name: Grant Suffix: Refresh Name Display Name: Formal Name: (B) me: OK Cancel Refresh
Enter the Biographic Information 9. Enter the Date of Birth (A) 10. If known, enter the Gender 11. Enter the Highest Education Level (B) 12. Enter the National ID (C) *Please note, if the appointee does not have a National ID, please enter XXX-XX-XXXX.*	**Biographic Information** (A) Date of Birth: 03/01/1970 0 Years 0 Months Birth Country: USA United States Birth State: Birth Location: Waive Data Protection: ☐ Biographical History Find | View All First ◀ 1 of 1 ▶ Last *Effective Date: 07/29/2020 (B) *Gender: Unknown *Highest Education Level: Bachelor's Level Degree *Marital Status: Unknown As of: Language Code: Alternate ID: ☐ Full-Time Student ▼ **National ID** Personalize | Find | View All (C) First ◀ 1 of 1 ▶ Last *Country *National ID Type National ID Primary ID USA Social Security Number 123-65-4444 ☑

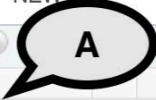|	
Add the Address 13. Click the Contact Information tab 14. Click Add Address Detail (A)	Biographical Details **Contact Information** Regional Organizational Relationships Anastasia Grant **Person ID:** NEW **Current Addresses** Personalize | Find | View All | 🔲 | 📊 First 🔹 **A** st Address Type As Of Date Status Address Home 07/29/2020 A Add Address Detail ➕ ➖ **Phone Information** Personalize | Find | 🔲 | 📊 First 🔹 1 of 1 🔹 Last *Phone Type Telephone **Extension** **Preferred** ⬍ ▢ ➕ ➖ **Email Addresses** Personalize | Find | 🔲 | 📊 First 🔹 1 of 1 🔹 Last *Email Type *Email Address **Preferred** ⬍ ▢ ➕ ➖
Add the Address 15. Click Add Address (A)	**Address History** **Address Type:** Home **Address History** Find First 🔹 of 1 🔹 Last *Effective Date Country *Status **Address:** **A** 07/29/2020 📅 USA 🔍 A 🔍 Add Address ➕ ➖ OK Cancel Refresh

Enter the Address 16. Enter the Address information, include City, State, and Postal (A) 17. Click OK (B)	**Edit Address** Please follow the standard address rules below when updating/entering your address: • Do not use commas or periods. • Use the '#' sign to indicate an apartment number. • Use mixed case, as opposed to all uppercase or lower case letters. Sample USA Address (international addresses may require other information): Address 1: 25 N 74 St # 83 Address 2: blank if no information needed City: San Jose State: CA Postal: 95192 **Country:** United States **Address 1:** 123 N 1st St A **Address 2:** **Address 3:** **City:** San Jose **State:** CA California **Postal:** 95192 B OK Cancel
Confirm the Address 18. Click OK (A)	**Address History** **Address Type:** Home Address History Find First ◀ 1 of 1 ▶ Last ***Effective Date Country *Status Address:** ＋ － 07/29/2020 USA A 123 N 1st St Add Address A San Jose, CA 95192 OK Cancel Refresh

Add the Phone and Email Information 19. Select the Phone Type (A) 20. Enter the Telephone and select Preferred 21. Select the Email Type (B) 22. Enter the Email Address and select Preferred	
Add the POI Relationship 23. Click the Organizational Relationships tab 24. Check the Person of Interest box (A) 25. Select the POI Type (B) 26. Click Add the Relationship (C) In the example, the POI Type of Volunteer is selected. See Appendix A for types of POIs and who has the responsibility for entering them in the system.	

Add the POI Data 27. Do not change the Effective Date unless you make it earlier than the current date (A) 28. Enter the three identified Security Access Types (B) along with Value 1 (C) and Value 2 (D) – see more information below the image 29. The Active row will default (E); add the Planned Exit date and complete the More Information field with the title of the POI 30. Add a row to create the Inactive row (F); the Effective Date is one day after the Planned Exit date; the status is I; remove the Planned Exit date and the Title 31. Click OK (G) *Please note, the Employee ID is generated when you click Add the Relationship and is displayed at the top of this page.*	
	Security Access Type 1 – Business Unit Value 1 = SJ000 **Security Access Type 2 – Location** Value 1 = SJ000 Value 2 = Your 4-digit Location Code/Extended Zip **Security Access Type 3 – POI Department** Value 1 = SJ000 Value 2 = Your 4-digit Department ID

Enter POI Information – Add POI Type

For POIs who have a current or previous affiliation with SJSU, and therefore have an Employee ID, you do not need to add the personal data but you should review it before adding the POI type.

Find the Person Navigate: Main Menu > Workforce Administration > Personal Information > Modify a Person Enter the search criteria (A) and hit enter or click Search Click the hyperlinked name of the person whose date you wish to review (B)	**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** ▼ **Search Criteria** Empl ID: begins with ◇ [ ] Name: begins with ◇ [ ] Last Name: begins with ◇ [SPARTAN]　**A** Second Name: begins with ◇ [ ] Alternate Character Name: begins with ◇ [ ] Middle Name: begins with ◇ [ ] ☐ Include History　☐ Correct History　☐ Case Sensitive [Search]　[Clear]　Basic Search 🔍 Save Search Criteria **Search Results** View All　First ◀ 1-4 of 4 ▶ Last

Empl ID	Name	Last Name	Second Name	...te Character Name	Middle Name
012759136	Samuel Spartan	SPARTAN	(blank)		J
012759149	Lucille Spartan	SPARTAN	(blank)		(blank)
012759162	Ellie Spartan	SPARTAN	(blank)	(blank)	(blank)
012759500	Samanta Spartan	SPARTAN	(blank)	(blank)	J

B

Review the Biographical Details 1. If the appointee's name has changed, insert a new effective dated row (B) and make the update	

Review the Contact Information 2. Click the Contact Information tab 3. Review the Current Address (A) 4. If the appointee has a new address, insert a new effective dated row (B) and make the update 5. Review the Phone Information and update the data if necessary (C) 6. Review the Email Addresses and update the data if necessary (D) 7. Once all changes are made, click Save (E)	Biographical Details Contact Information **A** Samanta Spartan **Person ID:** 012759500 **Current Addresses** Personalize | Find | View All | First **B** Last **Address Type** **As Of Date** **Status** **Address** Home 07/29/2020 A One Washington Square, San Jose, CA 95192 View Address Detail [+] [−] **Phone Information** Personalize | Fin **C** First ◀ 1 of 1 ▶ Last *Phone Type Telephone **Preferred** Home 408/555-1212 ☑ [+] [−] **Email Addresses** Personalize | Find | **D** of 1 ▶ Last *Email Type *Email Address Home sjsu.hrtest+spartan@gmail.com ☑ [+] [−] 💾 Save **E** Search Previous in List Next in List Notify Previou
Add the POI Type 8. Navigate: Main Menu > Workforce Administration > Personal Information > Organizational Relationships > Add a POI Relationship 9. Enter the Empl ID (A) 10. Enter or select the Person of Interest Type (B) 11. Click Add (C)	**Add new POI TYPE** Add a New Value **A** Empl ID: 012759500 🔍 Person of Interest Type: 00105 🔍 **B** Add **C**

Add the POI Data	
12. Do not change the Effective Date unless you make it earlier than the current date 13. Complete the Security Data (A) – see more information below the image 14. The Active row will default; add the Planned Exit date and complete the More Information field with the title of the POI (B) 15. Add a row to create the Inactive row; the Effective Date is one day after the Planned Exit date; the status is I; remove the Planned Exit date and the Title 16. Click OK (C)	
	Security Access Type 1 – Business Unit Value 1 = SJ000 **Security Access Type 2 – Location** Value 1 = SJ000 Value 2 = Your 4-digit Location Code/Extended Zip **Security Access Type 3 – POI Department** Value 1 = SJ000 Value 2 = Your 4-digit Department ID

Reappoint an Existing POI

Follow the steps below to reappoint a POI who has already been a POI in your department.

Find the Person 1. Navigate: Main Menu > Workforce Administration > Personal Information > Organizational Relationships > Maintain a Person's POI Reltn 2. Enter criteria to search for the person (A) 3. Check Include History (B) 4. Click Search 5. Click the appropriate hyperlink for the person (C)	**Maintain POI Types** Enter any information you have and click Search. Leave fields blank for a list of all values. **Find an Existing Value** ▼ **Search Criteria** Empl ID: begins with ◇ Person of Interest Type: begins with ◇ 🔍 **A** Name: begins with ◇ Last Name: begins with ◇ SPARTAN Second Name: begins with ◇ Second L... **B** ...e: begins with ◇ Alternate ... me: begins with ◇ ☐ Include History ☐ Correct History ☐ Case Sensitive [Search] [Clear] Basic Search 🔳 Save Search Criteria **C** **Search Results** View All First ◀ 1-4 of 4 ▶ Last 	Empl ID	Person of Interest Type	Name	Last Name	Second Name	Second Last Name	Alternate Character Name	Middle Name
---	---	---	---	---	---	---	---
012759136	00100	Samuel Spartan	SPARTAN	(blank)	SPARTAN	(blank)	J
012759162	00100	Ellie Spartan	SPARTAN	(blank)	SPARTAN	(blank)	(blank)
012759500	00105	Samanta Spartan	SPARTAN	(blank)	SPARTAN	(blank)	J
012759500	00204	Samanta Spartan	SPARTAN	(blank)	SPARTAN	(blank)	J	
Insert new Active and Inactive rows 6. Click the + sign to add the new rows	**Edit POI Relationship** Samanta Spartan Person ID: 012759500 **Person of Interest Type:** Volunteer **Security Data** Find | View All First ◀ 1 of 1 ▶ Last ➕ ➖ **Effective Date:** 07/29/2020 Personalize | Find | 🔲 | 🔳 First ◀ 1-3 of 3 ▶ Last 	Security Access Type	Enabled		Value 1		Value 2	
---	---	---	---	---	---	---
BUSINESS UNIT	✓	Business Unit	SJ000			
LOCATION	☐	Business Unit	SJ000	Location Code	0046	
POI DEPARTMENT	☐	SetID	SJ000	Department	1237	| **Person of Interest History** Personalize | Find | 🔲 | 🔳 First ◀ 1-2 of 2 ▶ Last **A** |	*Effective Date	*Status	Planned Exit	More Information			
---	---	---	---	---	---	---	---
1	01/01/2021 📅	I 🔍	📅		✎	➕	➖
2	07/29/2020 📅	A 🔍	12/31/2020 📅	Volunteer Event Support	✎	➕	➖	

Enter the New Dates

7. Enter the Active row's Effective Date and Planned Exit Date (A)
8. Enter the Inactive Row's Effective Date and change the Status to I
9. Remove the Planned Exit date and Title from the inactive row
10. Click Save (B)

Edit POI Relationship

Samanta Spartan   Person ID: 012759500

Person of Interest Type: Volunteer

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

Effective Date: 07/29/2020

Personalize | Find | 🖾 | 🏢   First ◀ 1-3 of 3 ▶ Last

Security Access Type	Enabled		Value 1		Value 2	
BUSINESS UNIT	✓	Business Unit	SJ000			
LOCATION	☐	Business Unit	SJ000	Location Code	0046	
POI DEPARTMENT	☐	SetID	SJ000	Department	1237	

Person of Interest History   Personalize | Find | 🖾 | 🏢   First ◀ 1-4 of 4 ▶ Last

	*Effective Date	*Status	Planned Exit	More Information			
1	07/01/2021	I				+	−
2	02/15/2021	A	06/30/2021	Volunteer Event Support		+	−
3	01/01/2021	I				+	−
4	07/29/2020	A	12/31/2020	Volunteer Event Support		+	−

(A)

(B)

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Update/Display

Inactivate POI Information

If you need to inactivate a POI appointment earlier than originally planned, follow the steps outlined in this section.

Find the Person 1. Navigate: Main Menu > Workforce Administration > Personal Information > Organizational Relationships > Maintain a Person's POI Reltn 2. Enter criteria to search for the person (A) 3. Check Include History (B) 4. Click Search 5. Click the appropriate hyperlink for the person (C)	**Maintain POI Types** Enter any information you have and click Search. Leave fields blank for a list of all values. **Find an Existing Value** ▼ **Search Criteria** Empl ID: [begins with �] [ ] Person of Interest Type: [begins with ▾] [ ] 🔍　**A** Name: [begins with ▾] [ ] Last Name: [begins with ▾] [SPARTAN] Second Name: [begins with ▾] [ ] **B** Second L... [begins with ▾] [ ] Alternate ...me: [begins with ▾] [ ] ☐ Include History　☐ Correct History　☐ Case Sensitive [Search] [Clear]　Basic Search 📰 Save Search Criteria **Search Results**　　**C** View All　　First ◀ 1-4 of 4 ▶ Last **Empl ID** / **Person of Interest Type** / **Name** / **Last Name** / **Second Name** / **Second Last Name** / **Alternate Character Name** / **Middle Name** 012759136 / 00100 / Samuel Spartan / SPARTAN / (blank) / SPARTAN / (blank) / J 012759162 / 00100 / Ellie Spartan / SPARTAN / (blank) / SPARTAN / (blank) / (blank) 012759500 / 00105 / Samanta Spartan / SPARTAN / (blank) / SPARTAN / (blank) / J 012759500 / 00204 / Samanta Spartan / SPARTAN / (blank) / SPARTAN / (blank) / J
Change the Dates 6. Change Effective Date of the inactive row (A) 7. Change the Planned Exit Date of the active row (B) 8. Click Save (C)	**Edit POI Relationship** Samanta Spartan　　　　　　　**Person ID:**　012759500 **Person of Interest Type:**　Volunteer **Security Data**　Find | View All　First ◀ 1 of 1 ▶ Last 　　　　　　　　　　　　　　　　　[+][−] **Effective Date:**　07/29/2020 　　Personalize | Find | 🔲 | 🔣　First ◀ 1-3 of 3 ▶ Last **Security Access Type** / **Enabled** / / **Value 1** / / **Value 2** BUSINESS UNIT / ☑ / Business Unit / SJ000 / / LOCATION / ☐ / Business Unit / SJ000 / Location Code / 0046 POI DEPARTMENT / ☐ / SetID / SJ000 / Department / 1237 **Person of Inter...** **A**　Personalize | Find | 🔲 | 🔣　First ◀ 1-2 of 2 ▶ Last 　　*Effective Dat... ...es　Planned Exit　**B** ...nformation 1 [01/01/2021] 📅 [I] 🔍 [　　　　] ... ✔ [+][−] 2 [07/29/2020] 📅 [A] 🔍 [12/31/2020] 📅 [Volunteer Event Support] ✔ [+][−] **C** [🖫 Save] [🔍 Return to Search] [📇 Previous in List] [📇 Next in List] [📧 Notify] [🔄 Refresh] [📝 Update/Display] 📄

SJSU | UNIVERSITY PERSONNEL

UNIVERSITY PERSONNEL 408-924-2250

Appendix A: POI Types, Usage and Responsibility

Persons of Interest are entered into the system by various entities on campus. Use this chart to determine whether or not you have the responsibility for entering a specific type of POI.

POI Type	Description	Usage	Responsible Party
000007	External Trainee	Used for individuals outside of SJSU who need to take a training class.	University Personnel
00010	Other	Used for anyone needing an ID and access who is not covered by another POI type. This will be used for Unpaid Interns.	Unpaid Interns – Department Others – University Personnel
00100	Future Hire	Used to key in Future Hires prior to their start date in order for their access to be created early.	CHRS Recruiting creates these automatically for new Faculty & Staff hires; Department may have to enter these at times
00101	Emeritus Faculty	Used for retired faculty designated as Emeritus.	University Personnel
00102	Exchange Faculty	Used for faculty participating in an exchange program.	University Personnel
00104	Emeritus Staff	Used for retired staff designated as Emeritus.	University Personnel
00105	Volunteer	Used for individuals designated as staff volunteers.	Department
00106	Volunteer Faculty	Used for individuals designated as faculty volunteers.	Department
00203	Auxiliary-Foundation	Used for employees of the Research Foundation.	Research Foundation
00204	Auxiliary-Associated Students	Used for employees of Associated Students.	Associated Students
00205	Auxiliary-Student Union	Used for employees of the Student Union.	Student Union
00206	Visiting Scholar	Used for Unpaid Visiting Scholars (domestic and international).	Department
00909	CHRS Recruit/Search Committee	Used for non-SJSU employees who are part of a Search Committee.	University Personnel
99150	Auxiliary-Alumni Association	Used for employees of the Alumni Association.	University Advancement
99200	Auxiliary-Spartan Shops	Used for employees of Spartan Shops and Chartwells.	Finance
99250	Auxiliary-Tower Foundation	Used for employees of the Tower Foundation.	University Advancement