



POI Process Review, Demonstration & Discussion

Presented by: University Personnel



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- [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



- 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



- 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



- 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



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



- 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



- 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



- 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



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



- 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



- 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



- 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



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



- 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



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



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



- 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



- 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



- 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



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



- 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)



- 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



- 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



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



- 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



- 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)



- Training
 - Request POI-specific training via email up-volunteer-appointments@sjsu.edu
- System Access
 - Complete the [PeopleSoft 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



- 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



- 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



- 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



- 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



- 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



- 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



- 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



- 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!

