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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)

Enter the Name
7. Add the First and Last Name (A)
8. Click OK (B)

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.
### Add the Address

13. Click the Contact Information tab
14. Click Add Address Detail (A)

### Add the Address

15. Click Add Address (A)
**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 |

**Confirm the Address**

18. Click OK (A)

**Address History**

| Address Type: | Home |
| Effective Date | 07/29/2021 |
| Country | USA |
| Status | A |
| Address: | 123 N 1st St San Jose, CA 95192 |

Add Address
### 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)
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)

**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 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)

Insert new Active and Inactive rows
6. Click the + sign to add the new rows
**Enter the New Dates**

1. Enter the Active row’s Effective Date and Planned Exit Date (A)
2. Enter the Inactive Row’s Effective Date and change the Status to I
3. Remove the Planned Exit date and Title from the inactive row
4. Click Save (B)
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)

**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)
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.

<table>
<thead>
<tr>
<th>POI Type</th>
<th>Description</th>
<th>Usage</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>00007</td>
<td>External Trainee</td>
<td>Used for individuals outside of SJSU who need to take a training class.</td>
<td>University Personnel</td>
</tr>
<tr>
<td>0010</td>
<td>Other</td>
<td>Used for anyone needing an ID and access who is not covered by another POI type. This will be used for Unpaid Interns.</td>
<td>Unpaid Interns – Department Others – University Personnel</td>
</tr>
<tr>
<td>0100</td>
<td>Future Hire</td>
<td>Used to key in Future Hires prior to their start date in order for their access to be created early.</td>
<td>CHRS Recruiting creates these automatically for new Faculty &amp; Staff hires; Department may have to enter these at times</td>
</tr>
<tr>
<td>0101</td>
<td>Emeritus Faculty</td>
<td>Used for retired faculty designated as Emeritus.</td>
<td>University Personnel</td>
</tr>
<tr>
<td>0102</td>
<td>Exchange Faculty</td>
<td>Used for faculty participating in an exchange program.</td>
<td>University Personnel</td>
</tr>
<tr>
<td>0104</td>
<td>Emeritus Staff</td>
<td>Used for retired staff designated as Emeritus.</td>
<td>University Personnel</td>
</tr>
<tr>
<td>0105</td>
<td>Volunteer</td>
<td>Used for individuals designated as staff volunteers.</td>
<td>Department</td>
</tr>
<tr>
<td>0106</td>
<td>Volunteer Faculty</td>
<td>Used for individuals designated as faculty volunteers.</td>
<td>Department</td>
</tr>
<tr>
<td>0203</td>
<td>Auxiliary-Foundation</td>
<td>Used for employees of the Research Foundation.</td>
<td>Research Foundation</td>
</tr>
<tr>
<td>0204</td>
<td>Auxiliary-Associated Students</td>
<td>Used for employees of Associated Students.</td>
<td>Associated Students</td>
</tr>
<tr>
<td>0205</td>
<td>Auxiliary-Student Union</td>
<td>Used for employees of the Student Union.</td>
<td>Student Union</td>
</tr>
<tr>
<td>0206</td>
<td>Visiting Scholar</td>
<td>Used for Unpaid Visiting Scholars (domestic and international).</td>
<td>Department</td>
</tr>
<tr>
<td>0909</td>
<td>CHRS Recruit/Search Committee</td>
<td>Used for non-SJSU employees who are part of a Search Committee.</td>
<td>University Personnel</td>
</tr>
<tr>
<td>99150</td>
<td>Auxiliary-Alumni Association</td>
<td>Used for employees of the Alumni Association.</td>
<td>University Advancement</td>
</tr>
<tr>
<td>99200</td>
<td>Auxiliary-Spartan Shops</td>
<td>Used for employees of Spartan Shops and Chartwells.</td>
<td>Finance</td>
</tr>
<tr>
<td>99250</td>
<td>Auxiliary-Tower Foundation</td>
<td>Used for employees of the Tower Foundation.</td>
<td>University Advancement</td>
</tr>
</tbody>
</table>