

Human Capital Management: Step-by-Step Guide

Adding an Additional POI Type to a Person of Interest (POI)

This guide describes the process for adding an additional POI type to a Person of Interest (POI) using an ePAR Non-Pay Action. POI types are used to define security roles that determine what systems a POI may access.

Warning: You can assign additional POI types the same day that the transaction for creating the POI was approved but you must use different effective dates; otherwise you will receive a data conflict error.

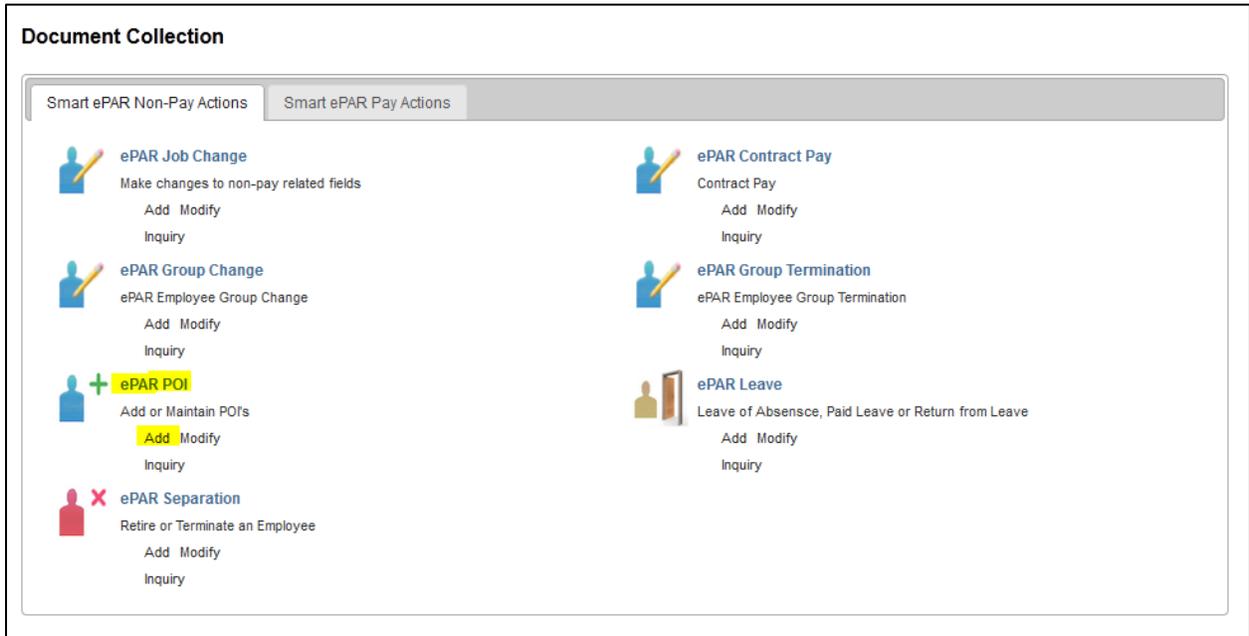
Before you begin, here are a few tips:

-  The looking glass is called a look up and displays search results for you to select valid field values.
-  The book and checkmark lets you spell check text boxes.
-  The trashcan lets you remove an item.
-  The down arrow lets you hide, or collapse, sections you do not want to view.

Click the  arrow to expand the section.

Beginning the Transaction

1. Navigation: **Main Menu > Smart Solutions > Document Framework > Document Collection.**
2. Select the **Smart ePAR Non-Pay Actions** tab.
3. Under ePAR POI, click **Add**.



The screenshot shows the 'Document Collection' interface with two tabs: 'Smart ePAR Non-Pay Actions' (selected) and 'Smart ePAR Pay Actions'. Under the 'Smart ePAR Non-Pay Actions' tab, there are several action items, each with an icon and a list of options (Add, Modify, Inquiry). The 'ePAR POI' item is highlighted in yellow. The 'ePAR POI' item has a plus sign icon and the text 'Add or Maintain POIs'. The other items are: 'ePAR Job Change' (pencil icon), 'ePAR Group Change' (pencil icon), 'ePAR Separation' (person with X icon), 'ePAR Contract Pay' (pencil icon), 'ePAR Group Termination' (pencil icon), and 'ePAR Leave' (person icon).

Step 1: Select POI Area

1. Click **Add Existing Empl ID as POI**.

Create ePAR POI Request

Step 1 of 3: ePAR - POI Search 

Transaction Details

PAR Action: Person of Interest	Action:	Document ID: ePAR POI
Request ID: NEXT	Reason Code:	Document Instance: 0
ePAR Status: Initial	Effective Date: 03/02/2016	Document Status: Initial / Add Entry
	Effective Seq: 0	

Select POI Areas

Maintain POI
 Add New POI
 Add Existing Empl ID as POI

Search Criteria

Empl ID: 

POI Type: 

2. In the **Empl ID** field type the ID of the POI, and press **Tab**.
3. Next to **POI Type**, click the look up  and select the new POI Type that you want to add:

Look Up POI Type x

Person of Interest Type begins with

 Basic Lookup

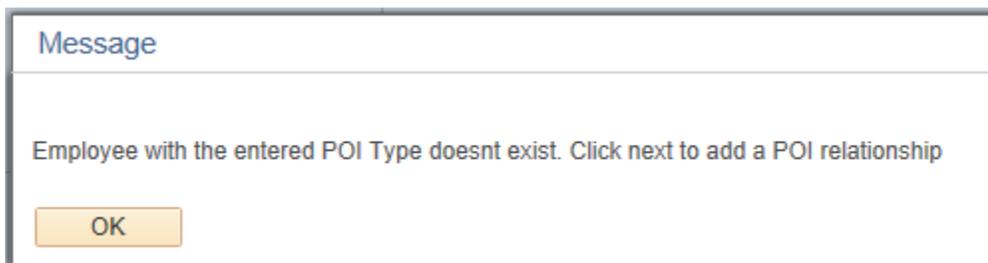
Search Results

View 100 First  1-22 of 22  Last

Person of Interest Type	Person of Interest Type
00007	External Trainee
00010	Other
00012	Affiliate
00013	Pre-Employment
00015	Security Access
00016	Veterans Administration
00017	Volunteer Clinical Faculty
00018	External Instructor
00020	Volunteer
00021	Visiting Scholar
00023	Affiliate - VA
00024	Affiliate - NJH
00025	Affiliate - DHHA
00026	Affiliate - PSL
00027	Affiliate - Kaiser
00028	Affiliate - Rose
00029	Student Athlete
00030	Summer Employment Gap
00031	Regent
00032	Electronic Research Admin
00033	Training Access
00034	CU Careers Search Committee

Refer to your campus HR for more information about which POI type you should select.

- Click **Search**. The system displays the following message, indicating that you have selected a relationship that does not currently exist on this POI's record.



- Click **OK**.
- Click **Next**.

Step 2: Personal Information

The system displays the POI's current information.

- Make any changes in the fields under the **New Value** column.
- Change the Effective Date to a day later than the default date if you are adding an additional POI type the same day the transaction for creating the POI was approved.

The screenshot shows the "ePAR POI ReadOnly" interface. At the top, there are navigation icons for Collaborate, Attach, Print, Workflow, Lifecycle Viewer, and Audit. Below the title, it says "Step 1 of 2: ePAR Maintain POI - Personal Information (Display Only)" and a "Switch View:" dropdown menu. The interface is divided into several sections:

- Transaction Details:**
 - PAR Action: Person of Interest
 - Request ID: POI0051281
 - ePAR Status: Approved
 - Action: (blank)
 - Reason Code: (blank)
 - Effective Date: 06/02/2016
 - Effective Seq: 0
 - Document ID: ePAR POI
 - Document Instance: 53638
 - Document Status: System Update / Completed
 - GoTo: (dropdown menu)
- Employee Details:**
 - Name: Mcgraw, Konnor
 - Empl ID: 292583
 - POI Type: 00033
 - Historical ePARs
 - Pending ePARs
 - Last Personnel Action: (blank)
 - Last Transaction Date: (blank)
- Biographical Information:**

	Current Value	New Value
Effective Date	06/01/2016	06/02/2016
Name Prefix:		
First Name:	Konnor	Konnor
Middle Name:		
Last Name:	Mcgraw	Mcgraw
Name Suffix:		
- Personal Information:**

	Current Value	New Value
Date of Birth:	08/12/1990	08/12/1990
Gender:	Male	Male
National ID:	XXXXX1234	XXX-XX-1234
Country:	USA	

3. Click **Next**.

▼ Home Address Information		
	Current Value	New Value
Country:	USA United States	USA United States
Address Line 1:	1234 Blueberry Lane	1234 Blueberry Lane
Address Line 2:		
Address Line 3:		
City:	Broomfield	Broomfield
State:	CO Colorado	CO Colorado
Postal Code:	80020	80020
County:		
▼ Home Phone Information		
	Current Value	New Value
Telephone:		
Preferred:	<input type="checkbox"/>	<input type="checkbox"/>
▼ Mobile Phone Information		
	Current Value	New Value
Telephone:		
Preferred:	<input type="checkbox"/>	<input type="checkbox"/>
▼ Business Phone Information		
	Current Value	New Value
Telephone:	303/860-4211	303/860-4211
Preferred:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		<input type="button" value="Next"/>
Jump To: Step 1) ePAR Maintain POI - Personal Infor 		
▼ Audit Details		

Step 3: Add POI Instance

1. Edit the **Planned Exit** date if it is something other than the default date displayed.
2. Select or type the **Business Unit** and **Department**.

Create ePAR POI Request

Step 3 of 3: ePAR POI - Add POI Instance

Transaction Details

PAR Action:	Person of Interest	Action:		Document ID:	ePAR POI
Request ID:	NEXT	Reason Code:		Document Instance:	0
ePAR Status:	Initial	Effective Date:	03/02/2016	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Employee Details

Name:	Historical ePARs	Empl ID:	Pending ePARs	POI Type:	00033
				Last Personnel Action:	
				Last Transaction Date:	

Person of Interest Type: Training Access
 Planned Exit: 03/02/2017

Data

Security Access Type	Enabled	Value 1	Value 2
BUSINESS UNIT	<input checked="" type="checkbox"/>	USYS	
DEPARTMENT	<input checked="" type="checkbox"/>	UCOLO	Department 51000

Previous

Audit Details

Entered By:	Updated By:
Entered On:	Updated On:

Step 4: Saving and Submitting the Transaction

1. Click **Save** from the top left corner.



2. Click **OK**.



3. Click **Submit**.

