



**CP 8.9 Business Process Guide
Add a Person**

(AP/HR user guide)

Last Revised: 8/15/2008

FINAL

Process Prerequisites/Assumptions

Prerequisite/Assumption	Detail
New Employee has accepted offer of employment	New Employee has communicated with the College/Dept that they are accepting employment at Cal Poly.
<p><u>CSUID Search</u> - perform CSUID Search</p> <p>If no results then contact AP prior to continuing with this Process (AP will use <u>Search Match</u> to make decision to add as a new POI)</p>	<p>Every effort should be made to ensure duplicate IDs are not created, only use this guide if no results were obtained through the ID Search. Try to obtain the new employees last 4 digits of their SSN. Also inquire if they were a former student or employee of Cal Poly. Use this information to complete your thorough ID Search.</p> <p>If a person is found through the CSUID search go to 'Create a New Contract' BPG</p>

Processing Steps

Hire

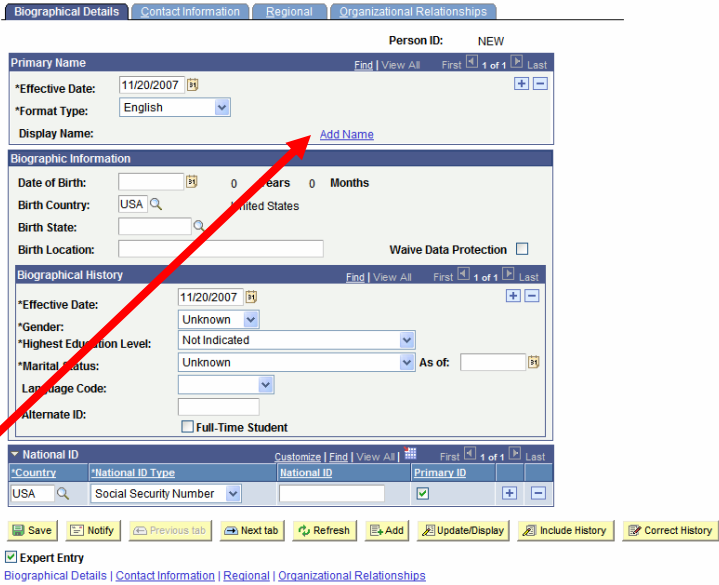
Used to add a NEW TO THE CAMPUS employee AND has had no previous employment record or existing EmplID in this campus database.

Add a New Value

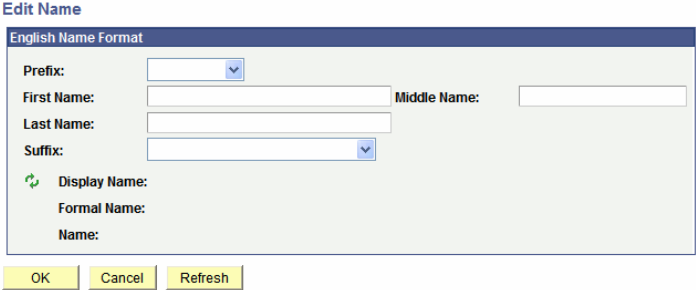
Navigation: Workforce Administration > Personal Information > Add a Person

Processing Steps	Screen Shot
<p>EmplID = NEW (default)</p> <ul style="list-style-type: none"> Leave as 'NEW' to automatically assign the next available number (increments by 13) <p>Click on the Add the Person link</p>	

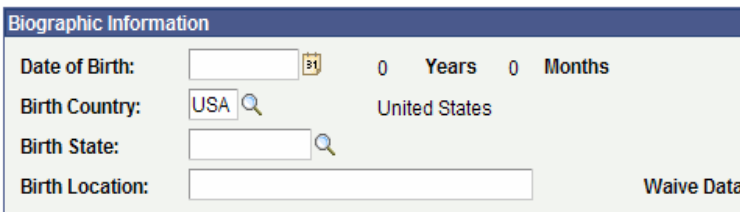
Biographical Details

Processing Steps	Screen Shot
<ul style="list-style-type: none"> This is a screen shot of the first page in this component – Biographical Details. Continue to the next section for data entry NOTE: Person ID remains 'NEW' until saved. <p>Primary Name Effective Date (Required) The effective date defaults to today's date. If effective date of employment is prior to today's date, revise the date to the effective date of hire.</p> <p>If a future effective date is entered, the following error is displayed: <i>"The EFFDT cannot be greater than today on the first row"</i></p> <p>Format Type (Required) Defaults to 'English'.</p> <p>Add Name Click on Add Name</p>	 <p>The screenshot shows the 'Biographical Details' form with the 'Primary Name' section expanded. A red arrow points from the 'Add Name' link in the 'Primary Name' section to the 'Add Name' link in the 'Biographical Information' section. The form includes fields for Effective Date, Format Type, and various biographical information sections like Biographic Information and Biographical History.</p>

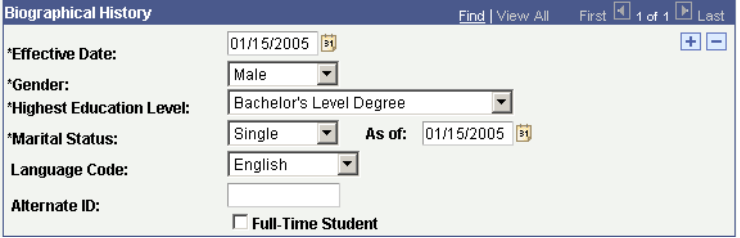
Primary Name

Processing Steps	Screen Shot
<p>Primary Name</p> <p>Enter name parts as appropriate.</p> <p>Prefix</p> <p>First Name</p> <p>Last Name</p> <p>Middle Initial if available (no period)</p> <p>Suffix if required.</p> <p>Click 'OK' when complete to return to the Biographical Details page.</p>	 <p>The screenshot shows the 'Edit Name' dialog box. It has a title bar 'English Name Format'. The form includes fields for Prefix, First Name, Middle Name, Last Name, and Suffix. There are also fields for Display Name, Formal Name, and Name. Buttons for OK, Cancel, and Refresh are at the bottom.</p>

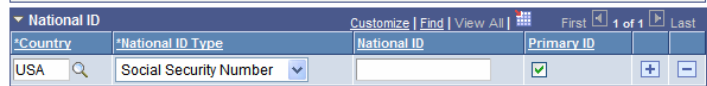
Biographic Information – This is completed by Academic Personnel in Post Intake

Processing Steps	Screen Shot
<p>This is completed by Academic Personnel in the Post Intake process</p>	

Biographic History

Processing Steps	Screen Shot
<ul style="list-style-type: none"> • Effective Date (required) Defaults to the effective date established in the Primary Name section. • Highest Education Level (required) Enter the Highest degree attained by the person. After completing this BPG, go to the Education BPG to enter the institution, degree type and graduation year • Marital Status – Used by Benefits area • As of – Used by Benefits • Language Code – Not Used • Alternate ID – Not Used • Full-Time Student – Leave as is 	

National ID

Processing Steps	Screen Shot
<p>National ID section Leave National ID blank - This is processed by Academic Personnel in the Post Intake process</p>	

Contact Information


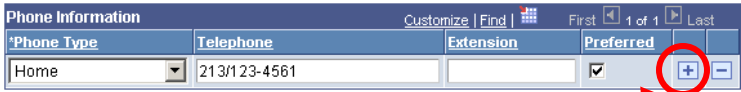
<ul style="list-style-type: none"> This is a screen shot of the Contact Information page Continue to next section for data entry process 	<p>Screen Shot</p>
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Current Addresses

<p>Processing Steps</p> <p>Add Home Address</p> <p>From the Contact Information page, click link to: Add Address Detail</p> <p>Address History page:</p> <ul style="list-style-type: none"> Effective Date (required) Defaults to the effective date entered in Primary Name section on the Biographical Details page Country Defaults to USA – Change if address is in another country Status (required) Defaults to 'A' (active) Address Remains blank until address is entered Click Add Address link Opens the Edit Address page Enter Address and click the 'OK' button. NOTE: do not use punctuation such as '.' or ',' <p>The Address entered now displays under 'Address' in Address History</p> <ul style="list-style-type: none"> Additional Addresses <ul style="list-style-type: none"> On-Campus – Required Click on sign to add an address – Selection On-Campus in drop down in Address Type field. Click Add Address Detail then Add Address. Address 1: Enter campus building number Address 2: Enter room number State: Enter CA 	<p>Screen Shot</p>
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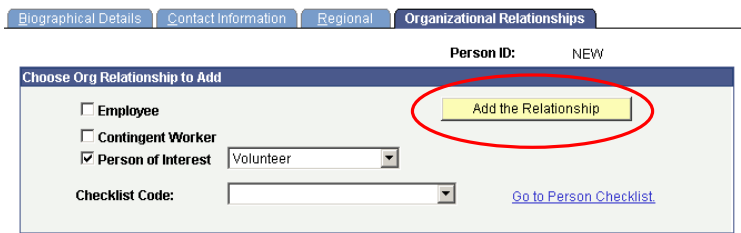
Processing Steps	Screen Shot
<ul style="list-style-type: none"> ○ Add Other Addresses as necessary • Address History The Address entered is now displayed under: 'Address' <p>NOTE: To add another address type, insert a new row and select a different address type and enter an address.</p>	

Phone Information

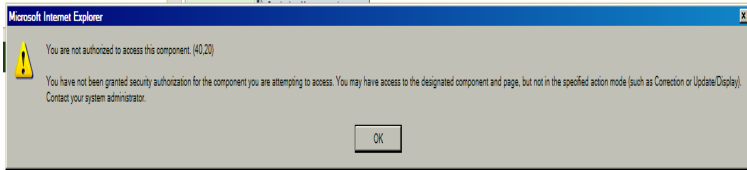

Processing Steps	Screen Shot
<ul style="list-style-type: none"> • Phone Type (required) Home: Select 'Home' from drop down. Enter phone number under Telephone. • On-Campus: Click  button to add next phone number Select 'On-Campus' from drop down and enter phone number. NOTE: Enter Phone number w/o adding any '/' or '-'. The system will format the number when you enter all 10 digits (area code and number). • Other Phones: Add other phone numbers such as cell, business, etc. • FAX: This are managed by Identity Management • Preferred Select Preferred check box for the Home Phone Type, if no Home then select Cellular, if no Cellular then select On-Campus. 	

Email Addresses - These are managed by Identity Management

Organizational Relationships

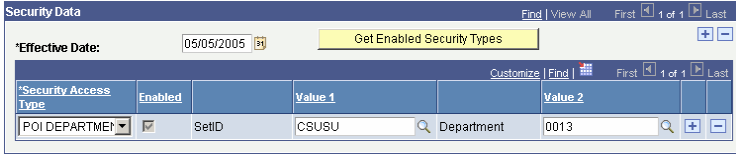
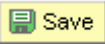

	Screen Shot
<p>Select Person of Interest (POI)</p> <p>Once selected, a drop down list will appear next to the Person of Interest</p> <p>Using the drop down list, select the available POI type:</p> <ul style="list-style-type: none"> ○ Future Hire <p>Click on the “Add the Relationship” button to continue.</p>	

**HCM 8.9 Add a Person
Workforce Administration BPG**

<p>If you receive this warning message: "You are not authorized to access this component (40,20)".... STOP. Academic Personnel will need to add this person due to PSoft identifying a potential duplicate. Endusers do not have security access to the page due to the sensitive data that displays.</p>	
<p>This warning will appear – This is an acceptable warning since the SSN is not entered at this time. Click 'OK'</p>	<p>Warning -- Social Security Number should be entered for US Employees. (1000,835)</p> <p>Social Security Numbers are now required for all persons employed in the United States regardless of citizenship status. You must track this information and should require that it be provided by Employees when they are Hired.</p> 

Security Data

Enter the department for security access.

<p>DO NOT click on the "Get Enabled Security Types" button.</p> <p>Security Access Type Select 'POI Department'</p> <p>Value 1 Select the Department SetID 'SLCMP'</p> <ul style="list-style-type: none"> Value 2 Select the department CLICK 'OK' then 	<p>Screen Shot</p>  <p>NOTE: <i>The Person Organizational Summary will display the current Department ID based on the system date. Future dated Security Data will not be displayed until it becomes current.</i></p>
<p>Click </p>	 <p>Biographical Details Contact Information Organizational Relationships</p> <p>Physics Test Person ID: 004734271</p> <p>Choose Org Relationship to Add</p> <p><input type="checkbox"/> Employee</p> <p><input type="checkbox"/> Contingent Worker</p> <p><input checked="" type="checkbox"/> Person of Interest Future Hire</p> <p>Add the Relationship</p> <p>Save Previous tab Next tab Refresh Add Upd</p> <p>Biographical Details Contact Information Organizational Relationships</p>

Go to Create a NEW Contract Business Process Guide