Person of Interest Job Aid

A Person of Interest is an individual doing work for the University who is not considered a traditional employee, known as a "Person of Interest." This may include visiting researchers or students, volunteers, perspective employees, independent contractors, etc.

The **Create Person of Interest** eForm is used to appoint a person to a POI position, without requiring compensation or a funding source for the position.

Create Person of Interest

Navigation: Main Menu > HRMS > UTZ Customizations > eForms for HR/Payroll Actions > Action Request

- 1. Navigate to the eForms Action Request page and click on the Add a New Value tab.
- 2. The **Initiate New eForms Request** page is displayed. Select the **Create Person of Interest** option from the "Action" drop down menu.

Create P	DI			
Action				
Actions	Create Person of Interest	T (Status	Request ID
*Justification				Request Date
				Processing Messages
				Request History

- The Create Person of Interest eForm is displayed. Use the Justification text box to explain or "justify" the reason for the new eForm action requested.
- 4. It is important to ensure the POI does not already have an existing Employee ID (Empl ID); use the Search Match page to confirm this. Click the **Search** button.

Create P	01		
Action			
Actions	Create Person of Interest	Status	Request ID
*Justification			Request Date
			Processing Messages
			Request History
		Search	

```
Empl ID
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- The Search Match page is displayed. Enter the employee information such as: First Name, Last Name, or Empl ID (if known) and click Search. Identify the employee and click the Select button to copy over the employee information.
- 6. Use the **Proposed Personal Information** to enter the following information: First Name, Last Name, Address, Birth Date, SSN, Gender, Home Email, and Phone number
- 7. The Job Information:
 - a) From the Hire Type drop down menu, select Add Person of Interest.
 - b) Choose the appropriate option for the Hire Reason, options may include:
 - Add POI
 - Rehire POI
 - c) Provide the Start Date and Expected End date
 - d) Select the **End Job Automatically** option if the job should automatically end by the provided "Expected End" date
 - e) Enter or look up the Position number
 - f) The Department ID will default automatically based on the Position number provided

g)	The Location Code, Mail Drop ID, and Report To will default based on the Position. Make
	changes as necessary.

Proposed Person	nal Information			
*First Name			Job Information	
Mid Name			*Hire Type	T
*Last Name			*Hire Reason	¥
*Address 1		Clean Address	*Start Date	31
Address 2			*Expected End	11
*City				End Job Automatically
*State			*Position	Q
*Zip			*Department	
*County			Location Code	
*Country	USA Q United States		Mail Drop ID	
*Birth Date	31		Reports To	
SSN			Reports to	~~~~
*Gender	T			
*Home Email				
*Home Phone				
Business Phone	•			

8. Click the **Save** button. Notice a **Request ID** number has been assigned, with a **Status** of "Saved." Create POI

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Actions	Create Person of Interest	Status	Saved	Request ID	00001470
*Justification	Create a POI			Request Date	04/08/2018
				Processing M	essages
				Request Histo	<u>ITY</u>

9. Expand the **Attachments** section to attach your signed POI form and expand the **Comments** section to include any special comments.

Туре	Note	Attached File	Attach Date/Time	By	View
Ackn of Service W/ Salary	POI Form	POI_Form.pdf	04/08/18 8:21PM	Mercedes Garcia-eF- Req	
Add/Delete					
Comments				Find First	1054
Commenta				<u> </u>	TULT
Signed POI form added	. CBC sent on 3/12/18.				Add/Edit
Signed POI form added	. CBC sent on 3/12/18.				Add/Edit
Signed POI form added	. CBC sent on 3/12/18. Garcia-eF-Req	DateTime 04/08/18 8:22PM			Add/Edit
Signed POI form added	. CBC sent on 3/12/18. Garcia-eF-Req	DateTime 04/08/18 8:22PM			Add/Edit

10. Click **Submit**. The eForm **Status** shows "Pending Approvals" and the current approval routing is displayed at the bottom of the page.