Overview
This guide outlines the necessary steps to maintain Person of Interest (POI) data. Steps include searching for and viewing existing data, updating personal information, maintaining emergency contact information, changing a person of interest’s title and inactivating persons of interest no longer working.

Table of Contents
Overview ................................................................. 1
Table of Contents .................................................. 1
Notice about the new version of PeopleSoft ............... 2
CSU ID Search ........................................................ 3
Modify Personal Data .............................................. 5
Emergency Contact Information .............................. 10
Update a Person of Interest’s Title ............................ 12
Inactivate a Person of Interest .................................. 14
Whom to Contact for Help? ..................................... 15
Notice about the new version of PeopleSoft
All page shots used in this guide are from the previous version of PeopleSoft (HCM 8.9). Please be advised that from the fourth week of February 2012, we are using the new version of PeopleSoft (HCM 9.0) and you may experience a difference in the way the new pages look and feel.

In the new version of PeopleSoft (HCM 9.0), the format of how the Main Menu expands has changed, but the actual navigation path and functionality has not changed. See the sample page shot.

Other minor changes include the following:

- Improved color scheme
- New look for Processing and Save indicators
- Pop-up Search Window and Edit Boxes
- Number of Search Results Option
- Type Ahead Matching
**CSU ID Search**

Use the CSU ID Search to find information about a person of interest (POI).

**Navigate to CSU ID Search**

1. Click CSU ID Search in the main menu

**The CSU ID Search page displays.**

2. Enter the EmpID, National ID or First and Last Name of the POI you are looking for

3. Push the Search button

*Note: It is recommended that you enter only partial First and Last Name in order to ensure you retrieve the best information.*
The results are displayed.

In this example, no results are found. It is recommended that you do multiple searches to ensure the data is or is not in the system.

If the POI you are looking for is not in the system, you must complete the appropriate form for creating a new POI. This form can be obtained from the Human Resources Office.

The results are displayed.

In this example, results are displayed and show that one person exists that matches the criteria entered.

If the POI you are looking for is in the system, but not connected to the correct department, you must complete the appropriate form for adding a POI type to an existing person. This form can be obtained from the Human Resources Office.

If the person exists as POI, view their Personal and POI data to ensure they are up-to-date and active. See the Modify Personal data section (page 4) and navigate to Workforce Administration > Personal Information > Organizational Relationship > Maintain a Person’s POI Relationship.
Modify Personal Data

Navigate to the Personal Data pages if you need to make updates to existing information. If your CSU ID Search results indicate that this person is also an employee and/or a student, do not make changes. Those should be made by the person via MyCSUEB self service or by Student Services or Human Resources, as applicable. Only make changes if the person exists only exists as a POI.

Navigate to Workforce Administration > Personal Information > Modify a Person

1. Enter the EmplID or Name (first name) and Last Name of the person
2. Click Search

The Biographical Details page is displayed.

The only data that should be updated here is the person's name.

2. Click the Plus sign to insert a new Effective Dated row

*Note: The birth date and SSN should be correct since the person already exists. If they are not, you may override them. No new effective dated rows are necessary.*
A new row is displayed.

3. Enter the Effective Date for the name change

4. Click the Edit Name hyperlink

The Edit Name page displays.

5. Make the appropriate name changes

6. Click the OK button once all changes have been made

You are returned to the Biographical Details page.

7. If you have no other changes to make, click the Save button at the bottom of the page

8. Click the Contact Information tab to update address, email or phone information
The Contact Information page is displayed.

9. To update the current address, click the View Address Detail hyperlink

The Address History page is displayed.

10. Click the Plus button to insert a new Effective Dated address row

A new row is displayed.

11. Update the Effective Date as appropriate

12. Click the Add Address hyperlink
The Edit Address page displays.

13. Update the address fields as appropriate

14. Click OK

You are returned to the Address History page.

15. Click OK

You are returned to the Contact Information page.

The most current address is displayed. If your update was future dated, it will not appear until that date arrives.

16. If you have no additional changes to make, click Save

17. If you need to update Phone or Email information, either override the existing information for the Type or insert a new row to add a new Type
18. Make sure one of the Phones and one of the Emails is marked as preferred.

19. Once all data is updated, click Save.
Emergency Contact Information
If you would like to maintain the emergency contact information for a person of interest, you may use the PeopleSoft pages to do so. Maintaining this information is optional.

Navigate to Workforce Administration > Personal Information > Personal Relationships > Emergency Contact

The Contact Address/Phone page displays.
1. Enter the Contact Name
2. Select the Relationship
3. Check
   - Primary Contact if appropriate
   - Same Address as Employee if appropriate
   - Same Phone as Employee if appropriate
4. To enter a different address, enter the Country code (USA) and click the Edit Address hyperlink

The Edit Address page is displayed.
5. Enter the address information
6. Click OK
You are returned to the Contact Address/Phone page.

7. Update the Contact Phone if appropriate

8. To add additional phone numbers, click the Other Phone Numbers tab, otherwise, click Save

The Other Phone Numbers page displays.

9. Enter the Phone Type(s) and numbers for additional phone types

10. Use the Plus button to insert new types

11. Click Save
Update a Person of Interest’s Title
At times, you may need to change the title of a Person of Interest. Follow the steps below to make the change.

Navigate to Workforce Administration > Personal Information > Organizational Relationships > Maintain a Person’s POI Reltn

The Maintain POI Types search page is displayed.

1. Enter the EmplID or Name (first name) and Last Name of the employee

2. Click Search

The results are displayed.

3. Click the hyperlinked name
The Edit POI Relationship page is displayed.

Insert a new Effective Dated row and change the title.

4. Click the Plus button
5. Update the Effective Date
6. Update the Title in the More Information field

Note: The Job Title can be no more than 30 characters in length, but the text box will allow you to key more. Additional characters will be truncated when the data feeds to the online phone directory.

A completed page might look something like this.

7. Once the change is made, click Save
Inactivate a Person of Interest

Persons of Interest cannot be terminated, but should be inactivated when they are no longer working in the department.

Navigate to Workforce Administration > Personal Information > Organizational Relationships > Maintain a Person’s POI Reltn

The Maintain POI Types search page is displayed.

1. Enter the EmpID or Name (first name) and Last Name of the employee
2. Click Search

The results are displayed.

3. Click the hyperlinked name
The Edit POI Relationship page is displayed.

Insert a new Effective Dated row and inactivate the employee.

4. Click the Plus button
5. Update the Effective Date
6. Change the Status from A to I

A completed page might look something like this.

7. Once the change is made, click Save

Whom to Contact for Help?
For additional help or to report problems with this functionality, please log a ticket via the Service Desk (http://www.csueastbay.edu/servicedesk).