QUICK GUIDE- TEMPORARY FACULTY MODULE

ADD A PERSON (New to PeopleSoft)Process (Add Organizational Relationships)

Summary

This guide applies to new Academic Year part-time temporary faculty and Teaching Associates that will be hired using the Temporary Faculty Module. The following process should be done prior to building Contract Data for the new employee in the Temporary Faculty Module

Tested- Screen shots-PRJ- 8.54 Single Sign On

The Office of Academic Personnel

Last Revised: March 01, 2018

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1.0 Introduction

This guide applies to Academic Year Temporary faculty and Teaching Associates (AY) that will be hired using the Temporary Faculty Module and:

a) Do not have an existing PeopleSoft ID Number or a Job Data record. **(Section 2.0 of guide).**

OR

b) Have an ***existing*** PeopleSoft ID Number, POI type (Campus Solutions, Auxiliary, Volunteer, CEL, etc.) and ***no*** Job Data records. **(Section 6.0 of guide).**

The following processes outline the steps to assign the above employees to an Organizational Relationship/ Person of Interest (POI) Type of **"Future Hire"** prior to hiring them in the Temporary Faculty Module. ***The process only needs to be done the first time the employee is hired. Afterwards, the system will update the POI Type based on Job Status.***

Please Note:

- **The POI Type of "Employee" is no longer used for appointments generated in the *<u>Temporary Faculty Module</u>*.**
- This process applies to employees with ***<u>no</u>*** existing Job Data records.
- Academic Year temporary faculty and Teaching Associates with an ***existing*** PeopleSoft ID Number and Job Data records should be hired by going directly to the ***Temporary Faculty Module*** and adding them to ***Contract Data***.
- Below is an example an employee with an existing PeopleSoft ID Number, POI Type and ***<u>no</u>*** Job Data records:

Search Reset

	Detail	Name	Empl ID	Natl ID (Last 4)	Applicant ID	DOB (mm/dd)	Org Rel	Empl Class	POI Type	HR Status	Empl Rcd Nbr	Job Code	Job Code Descr	DeptID
1	Detail	Stone,Grey	006227828	XXXX		01/01			Volunteer					

1.1 CSU ID Search

Utilizing CSU ID Search will help you verify whether or not the new employee exists in the system to avoid creating a Duplicate ID. You will also be able to identify which scenario applies to the new employee:

a) Employee has ***no*** PeopleSoft ID Number or Job Data records. **(Section 2.0 of guide).**

b) Employee ***has*** a PeopleSoft ID Number, POI Type and ***no*** Job Data records. **(Section 6.0 of guide)**

c) If you discover that a new employee has a PeopleSoft ID and Job Data records, proceed to hire them (AY-Temporary Faculty and AY- Teaching Associates) through the Temporary Faculty module.

Please Note:

- ❖ New faculty and Teaching Associates must be assigned to courses in ***Curriculum Management*** prior to building their Contract Data in the Temporary Faculty module.
- ❖ ***Curriculum Management*** is now located on the Campus Solutions side in PeopleSoft.

1.2 New Employee Provisioning

Hiring areas are ***not*** required to request confidential information such as **Social Security Number** and/or **Date of Birth** from employees.

New employees should be encouraged to complete the New Hire Intake Session held in Human Resources ***as soon as possible***. Human Resources validates and enters the Social Security Number and Date of Birth into PeopleSoft when the employee **completes** the new hire process.

To facilitate provisioning, the hiring area must have ***also*** created the ***Job Data*** transaction in PeopleSoft and ***assigned*** the employee to courses in ***Curriculum Management***. ***Curriculum Management*** is now located on the ***Campus Solutions*** side in PeopleSoft.

1.3 New Employee Intake Session/Human Resources

- ❖ The sooner new employees **complete** the new hire process in Human Resources, the sooner their MyCoyote account can be provisioned. The hiring area must have also created the ***Job Data*** transaction in PeopleSoft and assigned the employee to courses in ***Curriculum Management.***

- ❖ https://www.csusb.edu/human-resources/employment/hiring-process/new-hire-intake-meetings

Registration

Unit 3 (Faculty):

To register to attend the Faculty New Hire Intake Meeting, please click the following link: Unit 3 Meeting Registration

Unit 11 (Instructional Student Assistant, Teaching Associates & Graduate Assistants):

Excluding Work Study/Financial Aid Students

To register to attend the Unit 11 New Hire Intake Meeting, please click the following link: Unit 11 Meeting Registration

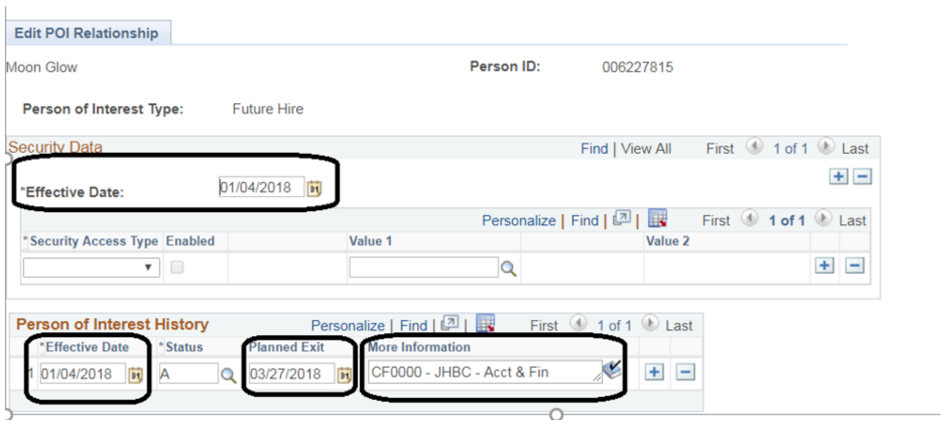
1.4 Access to Person Of Interest Component

In order to update the required fields in the ***Person of Interest Component***, the end user must have:

a) Security Access to the Person of Interest Component:

1) **Navigation**: Main Menu/Workforce Administration/Personal Information/Organizational Relationships**/ Maintain a Person's POI Reltn**
2) **Navigation**: Workforce Administration/Personal Information/Organizational Relationships/ **Add a Person of Interest**

b) Correction Mode: Correction Mode allows you to update and save information in the required fields:

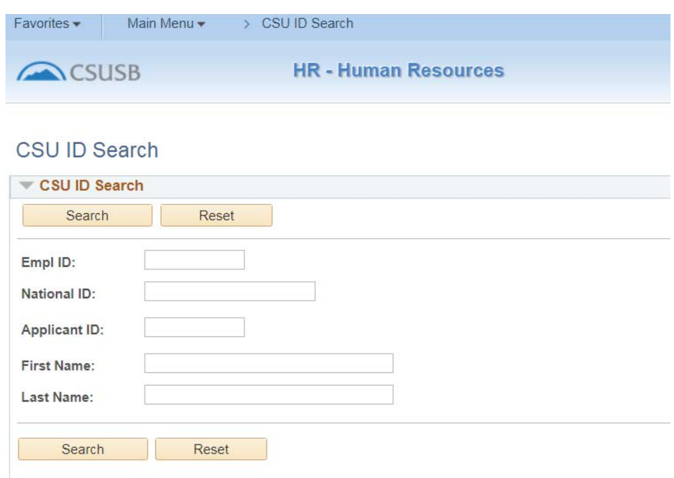


2.0 CSU ID Search Component

Navigation: Main Menu/ CSU ID Search

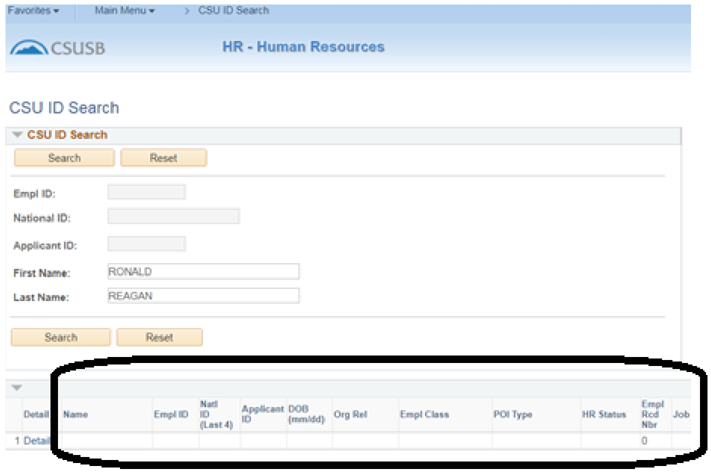
1) Enter the new employee's name in CSU ID Search. Searches can be done using the following criteria:

   a) First Name and Last Name
   b) Social Security Number (enter in the National ID field)



CSU ID Search Results:

To ensure a search is accurate, verify that the search criteria used is correct. A misspelled name will affect the Search Results.

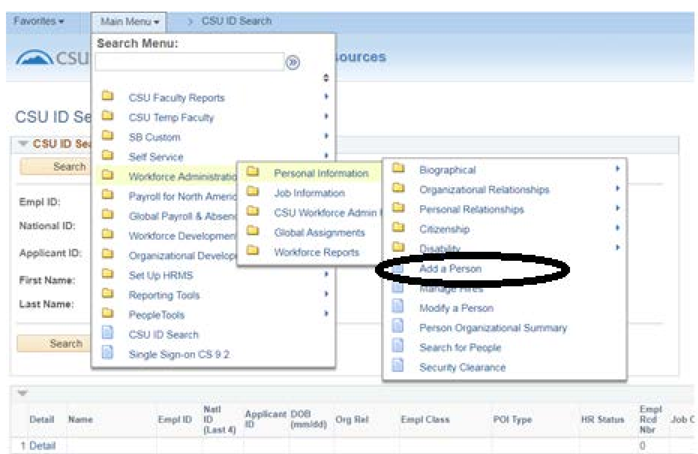


3.0 Add A Person Component

The Add a Person Component is used to add employees to PeopleSoft who ***do not*** have a PeopleSoft ID Number. For example, employees that do not exist in PeopleSoft.

Please Note: Use the **Add A Person Component** only after using CSU ID Search to confirm employee does not exist in PeopleSoft.

Navigation: Main Menu /Workforce Administration/Personal Information/Add a Person



3.1 Add A New Person Process

1) The ***Person ID*** field should contain the word ***"NEW"***. ***Do not make any changes to this field.*** The word ***"NEW"*** will remain in the field until the "Add the Relationship" button is clicked on the fourth and last tab, **Organizational Relationships** tab.

2) Click the "Add the Person" link.

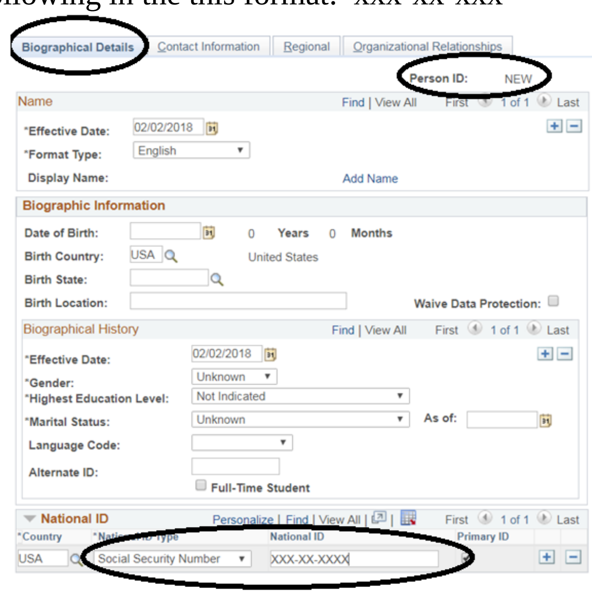
3.2 Biographical Details Tab

1) Verify that the ***Person ID*** field still contains the word ***"NEW"***. The PeopleSoft ID Number will not generate until the "Organizational Relationship" tab is completed (last tab).

2) **Employee Name**, **Home** and **Mailing** addresses must be completed. This is the minimum information needed to create the **POI Relationship** and have a PeopleSoft ID Number generated by the system.

3) Below are the minimum fields required to assign the POI Relationship, obtain the PeopleSoft ID Number and allow account Provisioning:

    a) Name
    b) Date of Birth
    c) Home Address
    d) Mailing Address (can be the same as Home address)
    e) Social Security Number- If this number is unknown input the following in the this format: xxx-xx-xxx



Please Note:

❖ The above fields need to be completed by the time the employee begins working. It is important that new employees complete the ***Intake Session*** for new hires held in ***Human Resources*** as soon as possible. Information regarding registration is Section 1.3, page 3 of this guide.

❖ Hiring areas are ***not*** required to request confidential information such as **Social Security Number** or **Date of Birth** from employees. ***It is advised that new employees complete the New Hire Intake Session held in Human Resources as soon as possible.***

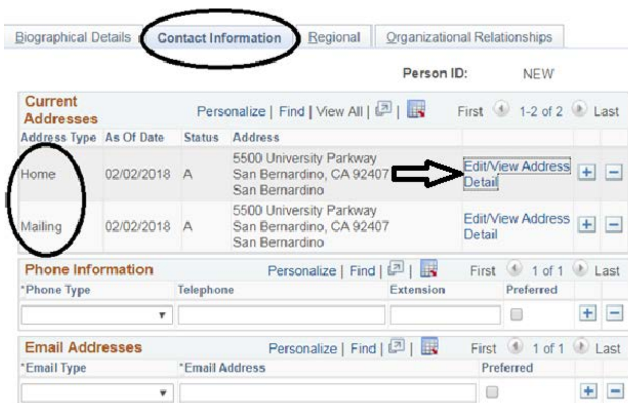
3.3 Contact Information Tab

1) Verify that the ***Person ID*** field still contains the word ***"NEW"***.

2) **Home Address:** Click on the "**Edit/*Add Address Detail***" link. Enter a complete address. At least **one** complete home address is required to complete the process of assigning the employee a relationship.

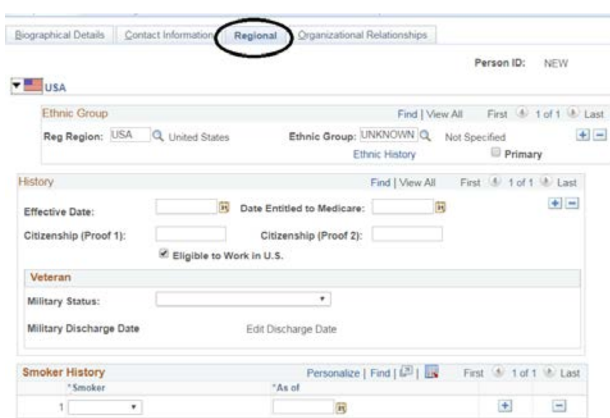
3) **Mailing Address:** Must be added to populate address on the Contract Letter generated in the Temporary Faculty module. The ***Mailing Address*** can be the same as the Home Address.

4) The ***Effective Date*** of the Address must be prior to or the same as the date of the employee's appointment ***Start Date***.



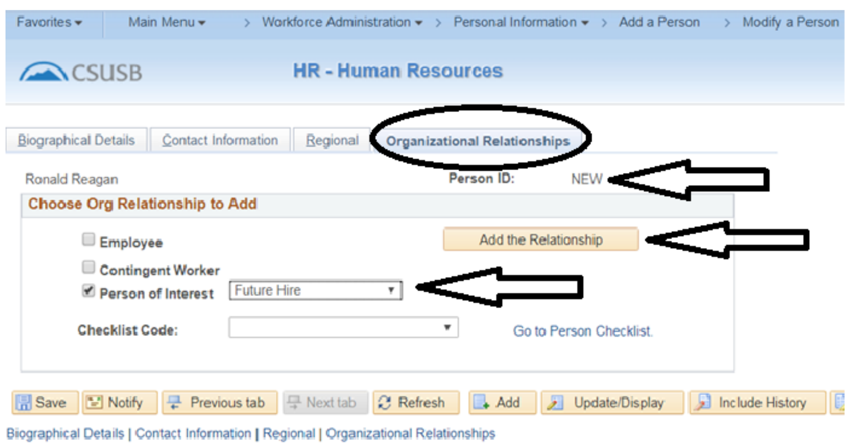
3.4 Regional Tab –(Optional)

Information will be validated when employee completes the New Hire Intake Session in Human Resources.



3.5 Organizational Relationships Tab

1) Verify that the ***Person ID*** field still contains the word ***"NEW"***. If it has changed, exit the page by clicking on Main Menu and ***do not save***. You will need to restart the entire process of adding the new employee.
2) "***Employee***" Organizational Relationship is <u>***no longer used for employees hired in the Temporary Faculty Module.***</u>
3) Select: **Person of Interest.**
4) Select: **"Future Hire"** from the drop down menu.
5) Click on the **"Add the Relationship"** button. The system will generate a **PeopleSoft ID** Number in the **Person ID** field.



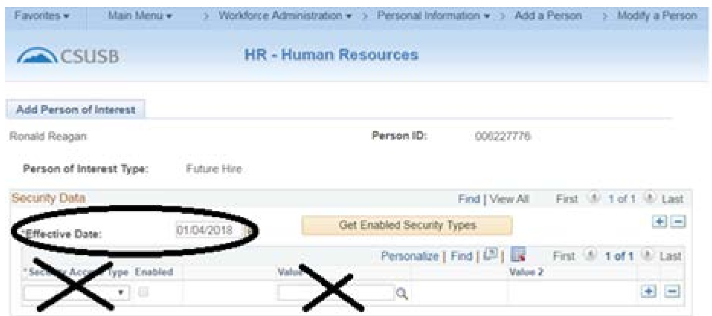
6) You will then be taken to the **"Add Person of Interest"** page.

4.0 Add Person of Interest Component

This component allows you to enter the effective date of the POI.

4.1 Security Data Section (Person of Interest Type)

1) **Effective Date Field**: Enter the effective date of the employee's appointment or prior.
2) **Security Access Type**: **<u>LEAVE BLANK</u>**
3) **Value 1**: **<u>LEAVE BLANK</u>**



4.2 Person of Interest History Section

- **Effective Date Field**: This field will default with the date entered in the ***Security Data*** Effective Date field. The date should be the beginning of the employee's appointment date or prior.

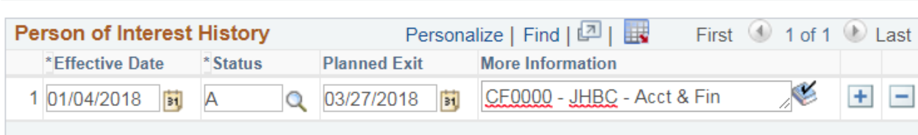
- **Status Field**: Should always have an "A" for "Active".

1) **Planned Exit Field**: Enter the expiration date of the employee's appointment if it is within the term the employee is hired. For example, enter the Quarter End Date for the term they are hired. This is done to allow new employees time to complete the hire process before being Deprovisioned.

  - Deprovisioning: If an employee's hire is not completed (***e.g. New Hire Intake Session completed, Job Data transaction entered in PeopleSoft, etc.***) by the **"Planned Exit"** date, their account ***<u>may</u>*** be Deprovisioned (access to MyCoyote, Email, etc. deactivated).

2) **More Information Field**: Input the hiring Department ID and college abbreviation:
For example: **CF0000 – JHBC - Acct & Fin**

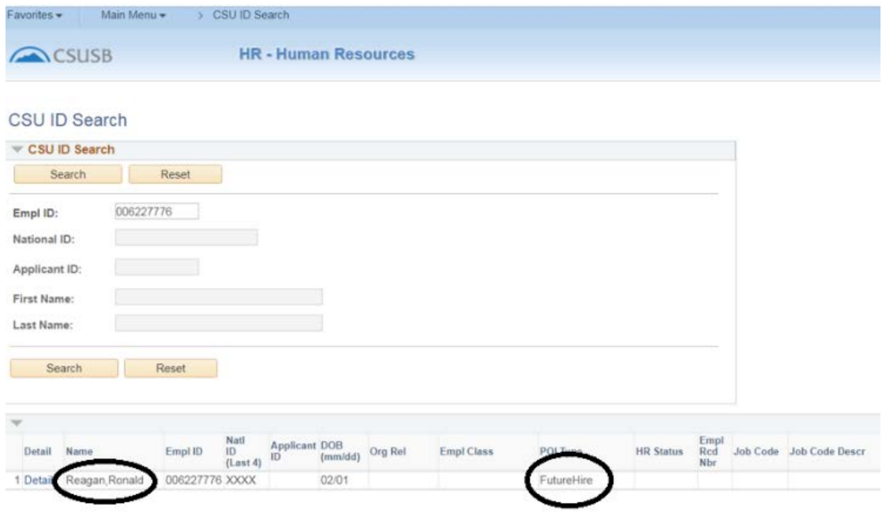
3) Click **"Apply",** and **"Okay"** to save.



5.0 CSU ID Search- Confirm POI Assignment:

1) Check CSU ID Search to confirm the employee is assigned a POI type of "***Future Hire***".

2) Once the POI type of "Future Hire" is confirmed you can proceed to assign the temporary faculty or Teaching Associate to courses in ***Curriculum Management***. ***Curriculum Management*** is now located on the ***Campus Solutions*** Side.

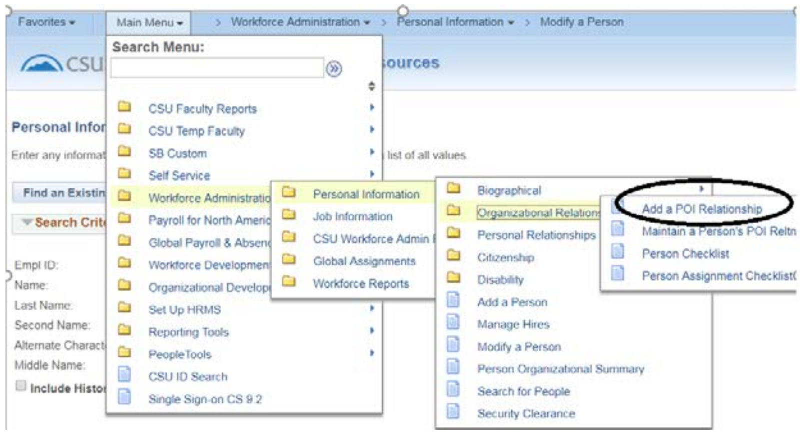


6.0 Add A POI Relationship Component

The Add a POI Relationship Component is used to add a POI Interest Type to employees with an ***Existing*** PeopleSoft ID Number, POI type (Campus Solutions, Auxiliary, Volunteer, CEL, etc.) and ***no*** Job Data records.

- ❖ Assumes the employee’s employment status has already been validated by using ***CSU ID Search***.

Navigation: Main Menu/Workforce Administration/Personal Information/Organizational Relationship/ Add a POI Relationship



6.1 Add A POI Relationship Page:

1) **Empl ID Field**: Enter the PeopleSoft ID Number

2) **Person of Interest Type Field**: Enter Future Hire code of ***00100*** or click the ***Looking Glass*** icon and select **“Future Hire”** from the list of options**.**

3) Click the “**Add**” button.

You will be taken to the **Add Person of Interest Component**.

6.2 Add A Person of Interest Component

This component allows you to enter the effective date of the POI.

6.3 Security Data Section (Person of Interest Type)

1) **Effective Date Field**: Enter the effective date of the employee's appointment or prior.
2) **Security Access Type**: **<u>LEAVE BLANK</u>**
3) **Value 1**: **<u>LEAVE BLANK</u>**

6.4 Person of Interest History Section

- ❖ **Effective Date Field**: This field will default with the date entered in the ***Security Data*** Effective Date field. The date should be the beginning of the employee's appointment date or prior.

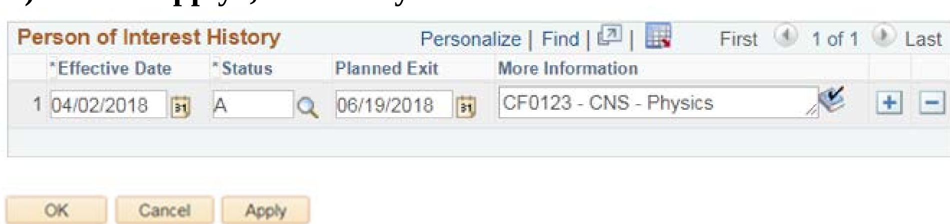
- ❖ **Status Field**: Should always have an "A" for "Active".

1) **Planned Exit Field**: Enter the expiration date of the employee's appointment if it is within the term the employee is hired. For example, enter the Quarter End Date for the term they are hired. This is done to allow new employees time to complete the hire process before being Deprovisioned.

- ❖ Deprovisioning: If an employee's hire is not completed (***e.g. New Hire Intake Session completed, Job Data transaction entered in PeopleSoft, etc.***) by the **"Planned Exit"** date, their account ***<u>may</u>*** be Deprovisioned (access to MyCoyote, Email, etc. deactivated).

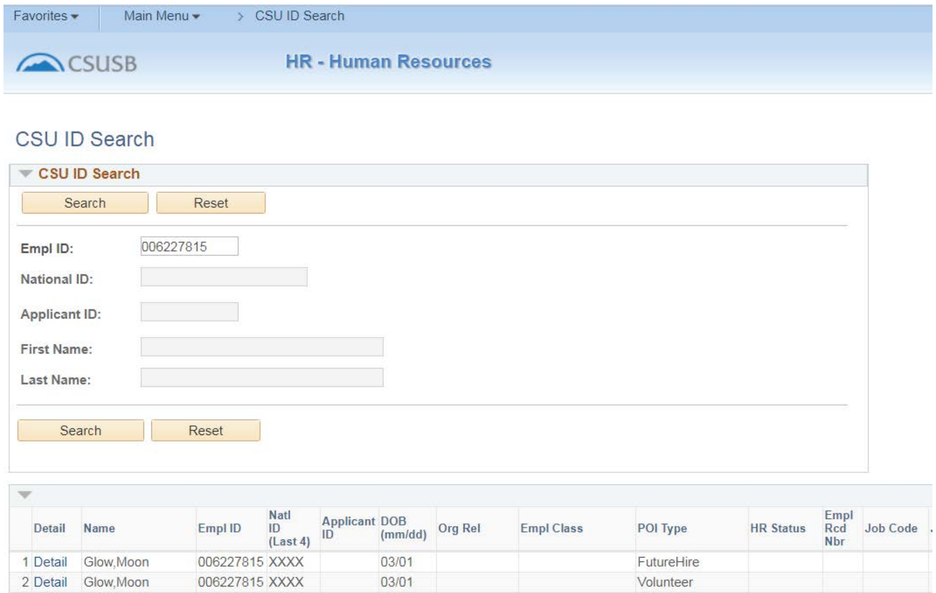
2) **More Information Field**: Input the hiring Department ID and college abreviation:
For example: **CF0123 - CNS - Physics**

3) Click **"Apply",** and **"Okay"** to save.



7.0 CSU ID Search- Confirm POI Assignment:

1) Check CSU ID Search to confirm the employee is assigned a POI type of "***Future Hire***".
2) The CSU ID Search results will display a row of data for ***each POI Type the employee has:***



3) Once the assignment of POI type ***"Future Hire"*** is confirmed, you can proceed to assign the temporary faculty or Teaching Associate to courses in ***Curriculum Management***.

   ❖ ***Curriculum Management*** is now located on the ***Campus Solutions*** Side.