### Process Prerequisites/Assumptions

<table>
<thead>
<tr>
<th>Prerequisite/Assumption</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Employee has accepted offer of employment</td>
<td>New Employee has communicated with the College/Dept that they are accepting employment at Cal Poly.</td>
</tr>
<tr>
<td>CSUID Search - perform CSUID Search</td>
<td>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 employee’s 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. If a person is found through the CSUID search do not use this BPG, go to <em>Create a New Contract</em> BPG</td>
</tr>
</tbody>
</table>

### Processing Steps

#### Process Detail

The Add a Person Business Process Guide is used to add a NEW TO THE CAMPUS employee AND has had no previous employment record, student record or existing EmplID in this campus database.

**People Soft Navigation:** Workforce Administration > Personal Information > Biographical > Modify a Person

#### Processing Steps

**Click Add a New Value Tab**

- **EmplID** = NEW (default)
  - Leave as ‘NEW’ to automatically assign the next available number (increments by 13)
  - Click **Add**

**Biographical Details Tab**

- **NOTE:** Person ID remains ‘NEW’ until saved.

- **Name Section:**
  - **Effective Date** (Required):
    - 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.
    - If a future effective date is entered, the following error will display: “The EFFDT cannot be greater than today when adding a person”
  - **Format Type** (Required):
    - Defaults to ‘English’.
  - Click **Add Name**
### Processing Steps | Screen Shot
--- | ---
**Edit Name** page:  
- Enter name parts as appropriate.
- Prefix – limited to ‘Dr, Mr, Ms’
- First Name – use upper lower case standard convention
- Last Name – use upper lower case standard convention
- Middle Initial if available (no period)
- Suffix if required.
- Click **OK** when finished to return to the Biographical Details page.

### Biographic Information Section:
Do not enter any data in this field. This is completed by Academic Personnel during the Post Intake process.

### Biographical History Section:
- **Effective Date** (required):  
  - Defaults to the effective date established in the Primary Name section.
- **Gender**: Enter if known
- **Highest Education Level** (required):  
  - Enter the highest degree attained by the person.
  - **NOTE**: A Juris Doctorate is considered a ‘Professional Degree’
- **Marital Status** and **As of**: *Used by Benefits*
- **Language Code**: *Not Used*
- **Alternate ID**: *Not Used*
- **Full-Time Student**: *Leave as is*

### National ID Section:
Do not enter any data in this field. This is completed by Academic Personnel during the Post Intake process.
## Processing Steps

<table>
<thead>
<tr>
<th>Contact Information Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>• This is a screenshot of the Contact Information page</td>
</tr>
</tbody>
</table>

*Continue to next section for data entry process*

## Processing Steps

<table>
<thead>
<tr>
<th>Current Addresses Section:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Home Address</td>
</tr>
<tr>
<td>Click link to: <a href="#">Add Address Detail</a></td>
</tr>
</tbody>
</table>

**Address History page:**
- **Effective Date** (required):
  - Defaults to the effective date used 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 information and click the OK button, then click the OK button again.

**NOTE:** Do not use punctuation.

The Address entered now displays under ‘Address’ in Current Addresses section.

**NOTE:** On Campus Address is no longer required.

**NOTE:** To add another address type, such as Mailing (if different from home), click the to insert a new row, select an address type and enter an address.

---

## Processing Steps

<table>
<thead>
<tr>
<th>Phone Information Section:</th>
</tr>
</thead>
</table>
| • **Phone Type** (required):
  - **Home**: Select ‘Home’ from drop down. Enter phone number under Telephone. |
- **Other Phones:** Add other phone numbers such as cell (mobile), business, etc by clicking [+] symbol.
- **On-Campus Phone:**
  - *Not required; this is managed by Telephone Administration*
- **Preferred**
  - Select Preferred check box for the Home Phone Type, if no Home then select Mobile, if no Mobile then select another phone type.

**Email Addresses Section:**
- These are managed by Identity Management

### Processing Steps

<table>
<thead>
<tr>
<th>Organizational Relationships Tab</th>
<th>Screen Shot</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Check Person of Interest (POI)</strong>&lt;br&gt;Once checked, a drop down list will appear next to the Person of Interest&lt;br&gt;Using the drop down list, select the available POI type:&lt;br&gt;  - <strong>Future Hire</strong>&lt;br&gt;</td>
<td><img src="image" alt="Screen Shot" /></td>
</tr>
</tbody>
</table>
| **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 this page due to the sensitive data that displays.<br>
  | ![Screen Shot](image) |
| **This warning will appear – This is an acceptable warning since the SSN is not available or entered at this time.**<br>Click OK. | ![Screen Shot](image) |

## Security Data Section:
**Security Access Type:** POI Department
**Value 1:** SLCMP
**Value 2:** Select the department

Click **OK**.

**NOTE:**
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.

Click **Save**.

**Go to ‘Create a NEW Contract’ BPG**