POI Process Review, Demonstration & Discussion

Presented by: University Personnel

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• Zoom Recording / Audio Transcript
  – Passcode: ?KR6Hy#$
• Introductions
• POI Types, Forms and Who Does What
• Tips for Faster Processing
• PeopleSoft Demonstration
• Training and Help
• Q & A
• Wrap Up
Introductions

• Carrie Medders
  — Senior Director, Technology & Training
• Maggie Carrera
  — Coordinator, Online Training & Compliance
• Recruitment will be open soon for the Volunteer, POI and Compliance Assistant position
POI Types

• CHRS Recruiting
• Future Hire
• Emeritus Faculty
• Emeritus Staff
• Volunteer Faculty
• Volunteer
• Visiting Scholar
• Other

• Auxiliaries
  – Alumni Association
  – Associated Students
  – Research Foundation
  – Spartan Shops
  – Student Union
  – Tower Foundation
• CHRS Recruiting
  - No forms; added by UP recruiting staff when a non-employee (e.g. student, community member, etc.) is part of a recruitment committee
POI Types with No Forms

• Future Hire
  – No forms; added via CHRS Recruiting integration process or manually by department admins and UP recruiting staff
POI Types for Emeritus

- **Emeritus Faculty**
  - Initiated by Department
  - Reviewed by Faculty Services, Office of the Provost, President
  - Finalized by Office of the President
  - Entered by Employee Support Services
POI Types for Emeritus

- **Emeritus Staff**
  - Initiated by Department
  - Reviewed by Dean/AVP, Division VP, UP Senior AVP, President
  - Finalized by Office of the President
  - Entered by Employee Support Services
All Other POI Types

• General Requirements
  – Department initiates form
  – Most forms have to be acknowledge by supervisor, chair or work lead, dean or appropriate administrator
  • If direct supervisor will be supervising a minor, they are required to complete LiveScan fingerprinting
  – In some cases additional documents must be attached by the department
All Other POI Types

- General Requirements
  - POI completes a portion of the form
  - Background check release
  - Vaccination proof acknowledgement
  - Eligibility to work information
  - Emergency contact
All Other POI Types

• General Requirements
  – The UP Leave Team will ensure proper documentation is received if the POI will be accessing campus; they will not approve if not received in a timely manner (5 days from date of request)
  – Faculty Services will ensure faculty-related POIs have the proper credentials to do the work they’re expected to do; they will not approve if the credentials are not adequate
All Other POI Types

• General Requirements
  – The UP Volunteer Team will review eligibility to work documentation if required; they will not approve if the POI is not eligible to work in the United States
  – The UP Volunteer Team will initiate and monitor background checks if required; they will not approve if the POI does not clear the background check
All Other POI Types

• General Requirements
  – UP is the final approval - all UP teams must approve in order for the POI to be appointed
  • Departments may NOT enter a POI until they receive the approved form from UP
  • Departments must adhere to the approved Start and End dates as indicated on the form by the UP Volunteer Team
  • Departments may only enter the POI approved; if another type of POI is needed another form must be submitted
Volunteer Faculty

• Types of Work
  – Athletic Coaching
  – Counselor
  – Instructor
  – Leadership Coach
  – Lecturer
  – Librarian
  – Researcher
Volunteer Faculty

• Process
  – **Volunteer form** initiated by Department
  – Acknowledged by Supervisor, Chair, Dean
  – Completed by Volunteer
  – Approved by
    • UP Leave Team
    • Faculty Services
    • UP Volunteer Team
    • If approved by all areas of UP, the form will be finalized and sent back to the department for processing
  – Entered by Department
Volunteer (Non-Faculty)

- Types of Work
  - Advisor
  - Athletic Training Support
  - Driver
  - Event Support
  - Mentor
  - Office Support
  - Presenter/Speaker
  - Research/Lab Support
  - Student Supervisor
  - Tutor
  - Usher
Volunteer (Non-Faculty)

- **Process**
  - [Volunteer form](#) initiated by Department
  - Acknowledged by Supervisor, Chair/Work Lead, Dean/Appropriate Administrator
  - Completed by Volunteer
  - Approved by
    - UP Leave Team
    - UP Volunteer Team
    - If approved by all areas of UP, the form will be finalized and sent back to the department for processing
  - Entered by Department
Unpaid Visiting Scholar

• Type of Work
  – Typically a person affiliated with another institution who devotes gratis effort to SJSU while participating in a short-term educational, research, or other academic project in collaboration with SJSU faculty
  – Not compensated, but units or departments may cover some expenses for them
  – Different forms for international and domestic
Unpaid Visiting Scholar - International

• Process
  – *Unpaid Visiting Scholar International form* initiated by Department; portions of the ISSS approved packet must be attached
  – Acknowledged by Faculty Sponsor, Chair or Program Director, Dean
  – Completed by Scholar
  – Approved by
    • UP Leave Team
    • Faculty Services
    • UP Volunteer Team
    • If approved by all areas of UP, the form will be finalized
  – Entered by UP Volunteer Team
Unpaid Visiting Scholar - Domestic

• Process
  – [Unpaid Visiting Scholar Domestic form](#) Initiated by Department
  – Acknowledged by Faculty Sponsor, Chair or Program Director, Dean
  – Completed by Scholar
  – Approved by
    • UP Leave Team
    • Faculty Services
    • UP Volunteer Team
    • If approved by all areas of UP, the form will be finalized
  – Entered by UP Volunteer Team
Unpaid Intern (POI Type: Other)

• **Type of Work**
  – An internship is a form of experiential learning that integrates knowledge and theory learned in the classroom with practical application and skills development in a professional setting.
  – Internships give students the opportunity to gain valuable applied experience and make connections in professional fields they are considering for career paths; and give employers the opportunity to guide and evaluate talent.
  – Interns may be paid, unpaid, or a combination of the two and are typically appointed for no more than one year.
  – Interns may not perform bargaining unit work.
  – A non-student may not be an intern.
Unpaid Intern (POI Type: Other)

- Process
  - **Intern form** initiated by Department; PD must be attached
  - Acknowledged by Supervisor, Chair/Work Lead, Dean/Appropriate Administrator
  - Completed by Intern
  - Approved by
    - Advisor
    - UP Leave Team (coming soon*)
    - UP Volunteer Team
    - If approved by all areas of UP the form will be finalized and sent back to the department for processing
    - *Form will soon be updated to include vaccination proof process
  - Entered by Department
    - Note: Intern must also sign the position description; signed PD should be sent to up-volunteer-appointments@sjsu.edu
Other POIs

- Type of Work/Reason for Appointment
  - These POIs may be employed by another entity (e.g. consulting firm, Chancellor's Office) but are doing work on campus (or remotely)
  - They may also be individuals who are not working on campus but need an ID for access to buildings and/or systems (e.g. housing residents, camp attendees)
Other POIs

• Process
  – **Person of Interest form** initiated by Department
  – Acknowledged by Supervisor, Chair or MPP
  – Completed by POI
  – Approved by
    • UP Leave Team
    • UP Volunteer Team
    • If approved by all areas of UP the form will be finalized
  – Entered by UP Volunteer Team
Tips for Faster Processing

• Do NOT retroactively appoint a POI in ANY category
• Submit form as early as possible
  – At least 2 weeks prior to preferred start date is best
    • Collecting vaccination proof may take up to 5 days
    • Getting background check results can take a week or more at times
Tips for Faster Processing

• Be as detailed as possible about the work to be done (or why the POI/Other is needed)
  – The more details we have up front the less back and forth we have to do with you
• Ensure the POI stays on top of what is needed
  – Vaccination proof
  – Eligibility to work proof when applicable
  – Completion of background check when applicable
Tips for Faster Processing

• Do not submit a duplicate form
  – If the first form wasn’t right, VOID it then submit a new form
• The person submitting the form should be the person who will key the data in, typically a department admin
• If you’re not sure which form to use, what to enter in certain fields, etc., contact up-volunteer-appointments@sjsu.edu
Before we start the demo, a few reminders:

- Always do a thorough CSU ID Search to avoid creating a duplicate EmplID
- These fields are required in order to convert the POI to CHRS; these are required in CHRS
  - SSN or ITIN
  - Date of Birth
  - Planned Exit
- Always key an inactive row (will not have to do this in CHRS)
Training, Access and Help

• Training
  – Request POI-specific training via email up-volunteer-appointments@sjsu.edu

• System Access
  – Complete the PeopleSoft System Access form (training required)

• Help
  – Find information on the UP Website
    • Process Toolkit/Onboarding
    • Resources/Forms & Documents
  – Contact us via email
    • up-volunteer-appointments@sjsu.edu
• How does a POI get an email?
  – Once the POI is entered, either by UP or the department, the EmplID is created; a process will then run overnight to create SJSUOne and email accounts; depending on timing, it may take 2 days for this process to complete
  – The POI will need to activate their SJSUOne account and then they will be able to access email
• How does a POI get a Tower Card?
  – The POI may upload a recent photo to: https://myid.sjsu.edu
  – The POI can then complete the SJSU Tower (ID) Card Mailing Request Form; a copy of the POI form is required
  – These forms are processed by the Tower Card Office
  – The POI can request that the card be mailed or picked up in person on campus
• When will the POI get access to CSULearn?
  – Usually 2-3 days after the appointment has been entered in PeopleSoft but sometimes closer to a week
• Can we add POI types?
  – No, we are no longer allowed to add our own POI types due to the standardization of types for CHRS
• What is the best place to access the Volunteer Request form? DocuSign template, UP website?
  – It is always best to find the updated forms on the UP website in the Onboarding section of the Process Toolkit or on our Forms page

• Are you accepting vaccine exemptions for POIs? And if so, do they also qualify for weekly testing on campus?
  – Exemptions are reviewed by UP staff; if approved, the POI is eligible for weekly testing; if not approved, the POI appointment will not be approved
• What is the best way we can obtain the SSN or ITIN from the students (or other POIs)?
  – Getting the information over the phone is best but you can also use a Qualtrics form or ShareBase; CSU Moveit is also a safe option; if you are unable to obtain the information you can contact up-volunteer-appointments@sjsu.edu and we will assist you
Do we need to notify you if we need to end a volunteer appointment early? What about for other POIs that departments don’t key?

- For volunteers or interns that you keyed you don’t need to notify us; you can key in the change yourself.
- For all other types that UP keys you should email up-volunteer-appointments@sjsu.edu with the updated information and we will update the record.
• Do folks who work for the on-campus food & beverage establishments, such as The Shop by Chef Baca in King Library, go through the POI process?
  – Yes, they are entered as Auxiliary-Spartan Shops
Wrap Up

• Don’t hesitate to reach out with questions
  – up-volunteer-appointments@sjsu.edu
• Timeliness is key; patience is helpful
• Thank you for attending today’s session!