



State of Wisconsin

Department of Administration

Adding a Person of Interest (POI)

New ADD

Purpose

This Job Aid will assist Agency Specialists entering an ADD row for a Person of Interest

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Definition

There are three different types of instances that may be added in PeopleSoft:

- Employee (EMP)
 - Any person who receives remuneration for services rendered to the state under an employer-employee relationship directly paid by the State of Wisconsin.
- Contingent Worker (CWR)
 - Any person who is paid by a third-party vendor for contracted services provided to the state.
- Person of Interest (POI)
 - Any *unpaid* person of interest to the state. Examples of this type of organizational relationship could be a volunteer or intern.

This Job Aid is focused on a Person of Interest (POI). If the above definition for POI does not apply to the person you are adding, please use the Job Aid appropriate for your person.

Search For an Existing Person

It is important to look up employee names in PeopleSoft prior to entering a hire to ensure that they aren't already in the system. Search for People is one way that an agency can view data about employees who are in other agencies.

Navigation: Main Menu > Workforce Administration > Personal Information > Search for People

Search/Match

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Search Type = Person 1

Search Parameter begins with PSCS_ADHOC 2

Ad Hoc Search

Description begins with

[Search](#) 3 [Basic Search](#) [Save Search Criteria](#)

1. **Search Type** = Person
2. **Search Parameter** = PSCS_ADHOC
3. Click **Search**

Search Criteria

Search Type Person Ad Hoc Search

Search Parameter PSCS_ADHOC CS_Person Adhoc Search

Search Result Rule ?

4 Search Result Code PERSON_DATA Personal Data 6 Search Clear All Carry ID reset

User Default

Search Criteria ?

Search Fields	Value
5 First Name Search	SARA
Last Name Search	JONES

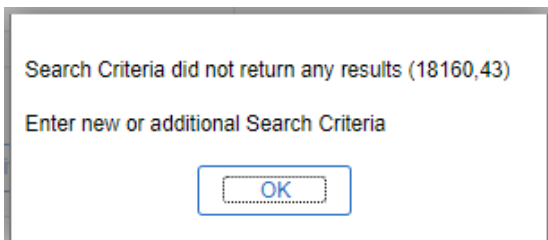
Search by Order Number ?

Search Order	Description
10	CS_AdHoc Search

Selective Search

4. **Search Result Code = PERSON_DATA**
 1. Additional options are available to return various data for purposes other than determining if a person exists
 2. Refer to the [Search for Person](#) Job Aid for more details
5. Enter the desired person’s first and last name into **First Name Search** and **Last Name Search** respectively
 - Press [Enter] or [Tab] on your keyboard to activate the Search button
 - Search values will change to all caps
6. Click **Search**

RESULTS: If the person does not exist in the system, the below message window displays. You should also search for the person in the Personnel Roster to ensure they have never been employed with the State before continuing with the ADD process. See [State Employee Roster Query](#) for instructions on how to search for people in the Personnel Roster. The [Enterprise Personnel Report](#) allows searching for people who are in PeopleSoft but not within your agencies security and are either active or inactive. This helps to avoid duplicating person records for people who already have an Empl ID in the system. If accurate results display, skip the [Add a Person](#) process and go directly to [“Steal” an Existing Inactive POI Record](#) process.



If a person exists in PeopleSoft as only a Contingent Worker (CWR) and/or Person of Interest (POI) they may not have all the information needed to search for them to avoid duplication. Please use all available search options to ensure the person is not already in the system before adding them. If you realize you’ve duplicated a person submit a JIRA ticket as soon as possible.

Add a Person

Enter Personal & Biographical Data

(New person in the system only)

If the person does not exist in PeopleSoft, add the person.

For an existing inactive POI in your security, skip to [Enter Job Data](#).

For an existing inactive POI outside of your security, skip to [“Steal” an Existing Inactive POI Record](#).

Navigation:

Main Menu > Workforce Administration > Personal Information > Biographical > Add a Person

Click Add Person



Do not change or add to the value of NEW in the Person ID field. PeopleSoft generates the Person ID.

Biographical Details tab

Name


1. ***Effective Date:** The date that the add is effective, or today’s date – whichever is earlier. The person data must have an effective date on or before the add effective date for job data to be created.
2. Click **Add Name** to enter the employee’s name


3. **Name Prefix:** Preferred prefix of the employee (optional)
 - Dr
 - Miss
 - Mrs
 - Hon.
 - Mr
 - Ms
4. ***First Name:** The employee’s legal first name as it appears on their Social Security Card
5. **Middle Name:** The employee’s middle name or middle initial as it appears on their Social Security Card
6. ***Last Name:** The employee’s legal last name as it appears on their Social Security Card
7. **Name Suffix:** The employee’s suffix, if applicable
 - II
 - IV
 - Sr.
 - III
 - Jr.
 - V
8. Click **Refresh Name**. Information in the Display Name, Formal Name, and Name populates.


9. Click **OK**

Biographic Information


Biographic Information




1 **Date of Birth** 06/19/1999  Years 23 Months 5


Birth Country USA  United States **Default**


Birth State *not used* 


Birth Location *not used* 2 **Protect Person Data**


Biographical History  | << < 1 of 1 > >> | View All


3 ***Effective Date** 11/21/2022   

4 ***Gender** Male 

5 ***Highest Education Level** Bachelors Level Degree 

6 ***Marital Status** Single 

7 **As of** 

8 **Language Code** 

Alternate ID *not used*

Full-Time Student *not used*

1. ***Date of Birth:** This data is required for benefits and WRS purposes
2. **Protect Person Data:** This box should be UNCHECKED for most employees. Used as an indicator for employees who have personal situations that make it necessary for their data to be excluded from external systems (only check if the employee needs to have their data protected).
3. ***Effective date:** This date should be the same as the other person effective dates.
4. ***Gender:** This data is required for EEO reporting and WRS purposes
5. **Highest Education Level** (optional)
6. ***Marital Status:** If an employee plans to enroll in insurance, this field is required. If unknown at time of entry, update as soon as information is known.
7. ***As of date:** date the marital status became effective
 - This is not required if Marital Status = Single
 - This date is required if Marital Status is anything except Single
 - If married, the date must match the date list for the spouse on the Update Dependent/Beneficiary page.
8. **Language Code:** Preferred language (optional)

National ID

National ID			
*Country 1	*National ID Type 2	National ID 3	Primary ID 4
USA	Social Security Number	123-45-6789	<input checked="" type="checkbox"/> + -

1. ***Country:** USA (Default)
2. ***National ID Type:** Social Security Number (Default)
3. ***National ID:** Enter the person’s Social Security Number
4. ***Primary ID:** Keep selected

Contact Information tab

Biographical Details	Contact Information	Regional	Organizational Relationships	Wisconsin Opt-In/Opt-Out
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Current Addresses

Current Addresses					
Address Type	As Of Date	Status	Address		
Home	11/21/2022	A		1 Add Address Detail	+ -

1. Click **Add Address Detail** to add the employee’s home address

Address History

Address Type Home

Address History	
*Effective Date	11/21/2022 <input type="text"/>
Country	USA <input type="text"/>
*Status	A <input type="text"/>
2	Add Address

All Default

2. Click **Add Address**

3 Country United States

Address 1 123 Main St

Address 2

Address 3

City Madison State WI

Postal

County

OK Cancel

Clear

Override Address Verification

Address Warning: Multiple Matches

Suggestions:

123 E Main St

123 W Main St

ARGUS FOOD & SPIRIT 123 E Main St

ROGER PUTNAM 123

EMPIRE REALTY 123 W Main St

edit with this suggestion

Country United States

Address 1 123 E Main St

Address 2

Address 3

City Madison State WI

Postal 53703-3360

County Dane

OK Cancel

Clear

Override Address Verification

Address Warning: Suite/Apt Missing

Suggestions:

123 E Main St

F1 1

Ste 12

Ste [200-202]

Ste 300

ARGUS FOOD & SPIRIT Ste 12

ROGER PUTNAM Ste 202

edit with this suggestion

3. Enter applicable address information



PeopleSoft populates the Postal and County and may correct address errors. If the address is auto-populating incorrectly, you can override the address validation by checking the Override Address Verification checkbox at the bottom.

Country United States

Address 1 123 E Main St Ste 12

Address 2

Address 3

City Madison State WI

Postal 53703-3362

County Dane

4 OK Cancel

Clear

Override Address Verification

No more suggestions

4. Once the Address Warnings disappear click **OK**

Address History

*Effective Date 11/21/2022

Country USA

*Status A

Address 123 E Main St Ste 12
Madison, WI 53703-3362
Dane

Add Address

5 OK Cancel Refresh

5. Click **OK**

Phone Information

The screenshot shows the 'Phone Information' form. It features a table with the following columns: *Phone Type, Telephone, Extension, and Preferred. A dropdown menu for *Phone Type is open, displaying a list of phone types. Red annotations highlight the *Phone Type dropdown (6), the Telephone, Extension, and Preferred fields (7), and the '+' button (8).

6. Select a value from the ***Phone Type** list
 - Employee's Work Phone can only be entered/modified by Agency HR Specialist
7. Enter the **Telephone** number, **Extension** (if applicable), and select the **Preferred** checkbox where appropriate
8. Click "+" to add an additional Phone Type, if applicable

Email Addresses

The screenshot shows the 'Email Addresses' form. It features a table with the following columns: *Email Type, *Email Address, and Preferred. A dropdown menu for *Email Type is open, displaying a list of email types. Red annotations highlight the *Email Type dropdown (9), the *Email Address and Preferred fields (10), and the '+' button (11).

9. Select a value from the ***Email Type** list
 - Business Type can only be entered/modified by Agency HR Specialist. Remember to verify the business email address when transferring a person between agencies to ensure its accurate.
10. Enter the ***Email Address** and select the **Preferred** checkbox next to the Business Email Address
11. Click "+" to add an additional Email Type, if applicable

The screenshot shows the 'Instant Message IDs' form, which is crossed out with a large red X. A yellow banner at the top indicates it is 'NOT USED'. The form has a table with the following columns: *IM Protocol, *IM Domain, *Network ID, and Preferred.

Regional tab

Biographical Details | Contact Information | **Regional** | Organizational Relationships | Wisconsin Opt-In/Opt-Out

John Doe III | Person ID NEW

USA

Ethnic Group | 1 of 1 | View All

Regulatory Region: USA | United States **Default** [+] [-]

1 Ethnic Group [] []
 Primary

History | 1 of 1 | View All

Effective Date: 11/21/2022 **Defaults from Biographical Details tab** | State Entitled to Medicare [] [] [+] [-]

Citizenship (Proof 1) [] | Citizenship (Proof 2) []

Eligible to Work in U.S.

Veteran

2 Military Status [] [v] | Edit Discharge Date

Military Discharge Date []

Smoker History **Not Used**

*Smoker	*As of	[+]	[-]
1	[] []	[+]	[-]

1. Enter or select ***Ethnic Group**
 - The employee may identify as more than one ethnic group. Select plus sign (+) to add additional Ethnic Groups.
 - Select the ***Primary** checkbox for the ethnic group that is considered primary
2. Select an appropriate value from the **Military Status** list. Use the Edit Discharge Date link, if applicable
 - Not a Veteran
 - Not indicated
 - Veteran

Organizational Relationships tab

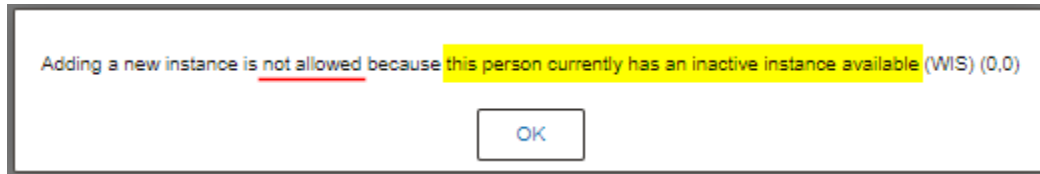
1. Select the **Person of Interest** checkbox
2. Select the appropriate POI type

a. Advisory Council Member	e. Board Member	m. Intern
b. Agency Partner – IT Access	f. Council Member	n. Job Coach
c. Agency Partner – No IT Access	g. EMR/HER	o. Patient Worker
d. Balanced Interview Panel Member	h. Emeritus	p. Pre-PS At-Risk/ Layoff/SIWRP
	i. Exam Rater	q. Subject Matter Expert
	j. Extern	r. Unpaid Intern
	k. Foster Grandparent	s. Volunteer
	l. Instructors	
3. **Select Checklist Code:** Add Person of Interest Inst.
4. Click **Add Relationship**

RESULTS: At this point, Personal Data is complete. You will automatically be redirected to the Job Data page at the Work Location tab to continue the new hire process. Proceed to the [Enter Job Data](#) process below. If you do not complete Job Data at this time you will need to [Add a New POI Instance](#) later to complete the new hire process. Make note of the newly assigned Empl ID.

“Steal” an Existing Inactive POI Record

If there is an inactive POI record in the system for your person and you try to add a new POI instance you will get the following error message:



Because the “steal” function requires a position number the system won’t let you steal a POI record (unless you have a position number for your new POI). When an inactive POI is starting a new POI job at a different agency or outside of your security at your agency, please submit a JIRA ticket requesting Central HR to add the “Steal” row for you. Please provide the following information:

- Effective date
- Business Unit
- Department ID
- Location
- Reports To

Add a New POI Instance

When to add a new POI instance:

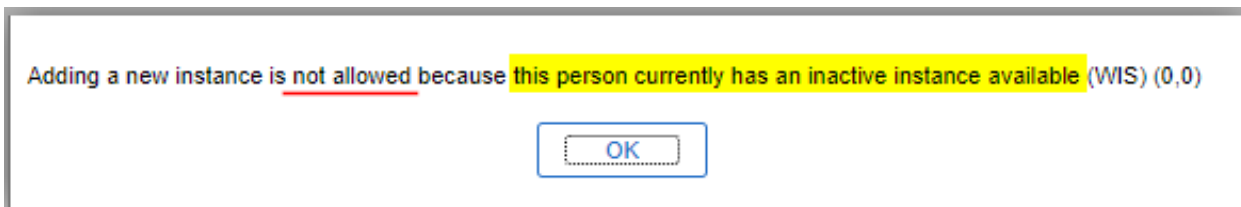
- When there is no inactive POI instance available
- Hiring into a POI when the person is already in PeopleSoft as an EMP and/or CWR only
- If you don’t flow directly to job data when entering a new [person](#) into the system

Create a new POI instance for the new job. This instance is assigned a new Empl Record number which is used to track transactions and records associated to the job.

Navigation: Main Menu > Workforce Administration > Job Information > Other Payee

1. Enter or select the desired **Empl ID**
2. Once you tab out of the Empl ID field, the Empl Record field will automatically fill based on the highest existing **Empl Record** in the system. Do not manually override.
3. Select the appropriate **Person of Interest Type**
4. Click **Add Relationship**

Despite your best efforts to locate the employee in the system prior to creating the new instance you may receive the following pop-up message:



This means the employee has an inactive Empl Record that you must “steal”.

5. Enter or select the desired ***Effective Date** for the start of the job
6. **Reason:** Select *Add Person of Interest*

Continue to Enter Job Data.

Enter Job Data

Navigation for Rehire: Main Menu > Workforce Administration > Job Information > Job Data



DO NOT CLICK SAVE UNTIL ALL FIELDS IN ALL TABS AND LINKS HAVE BEEN COMPLETED AS DIRECTED IN THIS SECTION

Work Location tab

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Position Number

Override Position Data

Position Entry Date Override Position Entry Date

Position Management Record

1 *Regulatory Region United States Default

2 Company State of Wisconsin

3 *Business Unit Administration Default

4 *Department Dept of Administration

Department Entry Date

5 *Location 505 ADMINISTRATION BLDG

1. ***Regulatory Region:** USA (Default value)
2. **Company:** Select your agency's company (LEG, WCC, WCS or WIS)
3. ***Business Unit:** This field defaults to 50500 (Administration). Change this field to match your Business Unit, if different.
4. ***Department:** Enter the Department ID for this POI
5. ***Location:** The location generally defaults from the Department ID automatically. If it is not correct, select the correct location for this POI.

NOTE:

The following warning message will pop up for Business Units under Companies LEG, WCC & WCS. Click **OK**.

Warning -- Job Code will be cleared. It is not valid for this Business Unit. (1000,302)

The specified field will be cleared on the page. It is not valid for the newly selected Business Unit or Set ID.

OK

Job Information tab

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation
-------------------------------	--	---------------------------	-------------------------	-----------------------------	------------------------------

6 *Job Code

Entry Date

Supervisor Level

Supervisor ID

7 Reports To

POI - Person of Interest

*Regular/Temporary	Regular		*Full/Part	Full-Time
Empl Class	NonEmployee	Default once Job Code is entered	*Officer Code	Not Applicable
*Regular Shift	Not Applicable		Shift Rate	<input type="text"/>
*Classified Ind	Other		Shift Factor	<input type="text"/>

Standard Hours ⓘ

Standard Hours	40.00		Work Period	W	Weekly
FTE	0.000000				

Adds to FTE Actual Count? Encumbrance Override

Contract Number ⓘ

Contract Number <input type="text"/>	Next Contract Number
Contract Type	

USA

*FLSA Status	Nonexempt
*EEO Class	None of the Above

Work Day Hours

6. ***Job Code:** POI00
 - a. This is the only Job Code for a POI
 - b. POI00 will default for Company WIS
 - c. POI00 will need to be manually entered for Companies LEG, WCC & WCS
 - d. All other required values default, except Reports To
7. **Reports To:** Enter the Reports To for this POI, if applicable

Payroll tab

*Payroll System

Payroll for North America ? All values are Default

Pay Group Dept of Administration
Defaults from Business Unit on Work Location tab
 Pay Type Hourly
 Tax Location Code Wisconsin
 Holiday Schedule WISCONSIN
Defaults from Company on Work Location tab
 GL Pay Type Leave all Default values as is
 FICA Status [Edit ChartFields](#)

Everything on this tab will default appropriately.

You do not need to change anything.

Benefits Program Participation link

Benefit Status ?

↺
 Effective Date 11/21/2022
 Effective Sequence 0
 HR Status Active
 Job Status Active

Annual Benefits Base Rate

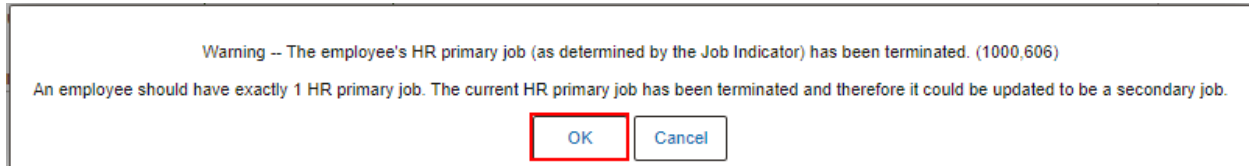
Benefits Administration Eligibility ? Values are Default

Benefit Record Number: This will default to zero if no other instances exist in the system. This number should **NEVER** match a benefit record number from an employee instance.

Once you have rechecked all the tabs and links to ensure everything is correct, click **Save**.

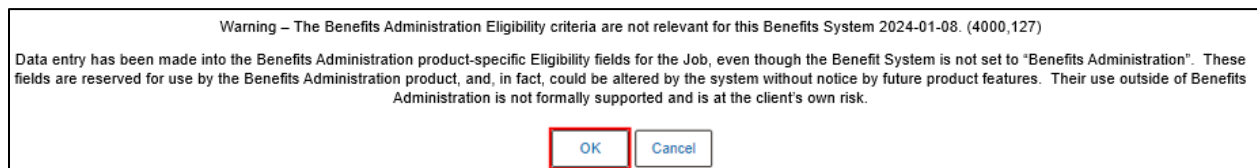


The system doesn't like the Job Indicator to be Not Applicable when there is more than one Employee Record so you will get the following warning:



Click **OK**.

The system doesn't like Elig Fld 1 filled in when the Benefit System is *Not Manages in PeopleSoft* so you will get the following warning:



Click **OK**.

