

9.2 Hiring a Person of Interest (Volunteer)

Purpose: Use this document to enter a new person of interest (aka volunteer) into ctcLink.

Audience: Human Resources Specialist.

! You must have at least one of these local college managed security roles:

- ZC HR Employee Maintenance
- ZZ HR Employee Maintenance
- ZZ SS Workforce Administrator

ZD HCM SOGI - View SOGI role is required for users to view Pronouns and SOGI on the Personal Data page.

Access to Add/Update Personal Data Biographical fields are given though the other roles listed above.

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

POI (Person of interest) is an interchangeable term for Volunteer. In the areas of Organizational Relationships, there is some specific fields to choose Person of Interest. There is also a step when adding an instance (for Payroll) where it must be set up for Other vs. Payroll for North America. The POI fields also drive some Benefit information.

An example of this would be to use this process for Board members; where a record is desired, but no pay or benefits will be pulled for that person.

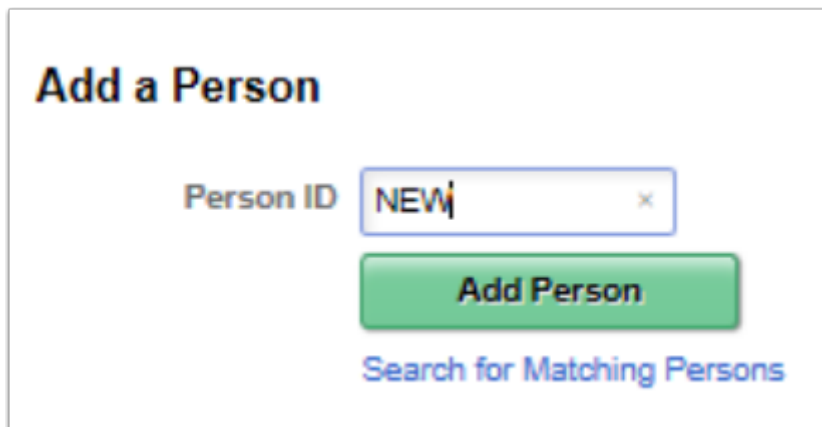
Hiring a Person of Interest aka Volunteer

! **IMPORTANT:** Before you begin this process, be sure to perform the Search Match process to verify if the person has an existing Employee ID. Refer to the [Run a Search Match](#) QRG.

Add a New Employee

Navigation: NavBar > Navigator > Workforce Administration > Personal Information > Add a Person

1. The Add a Person page displays.
2. The **Person ID** value will default to **NEW**. Leave as is if the person **does not** have an existing EMPL ID based on your Search/Match results.
3. If the person does have an existing **EMPL ID** found in the **Search Match** results, follow steps in the Adding a Job Instance section.
4. Select **Add Person**.



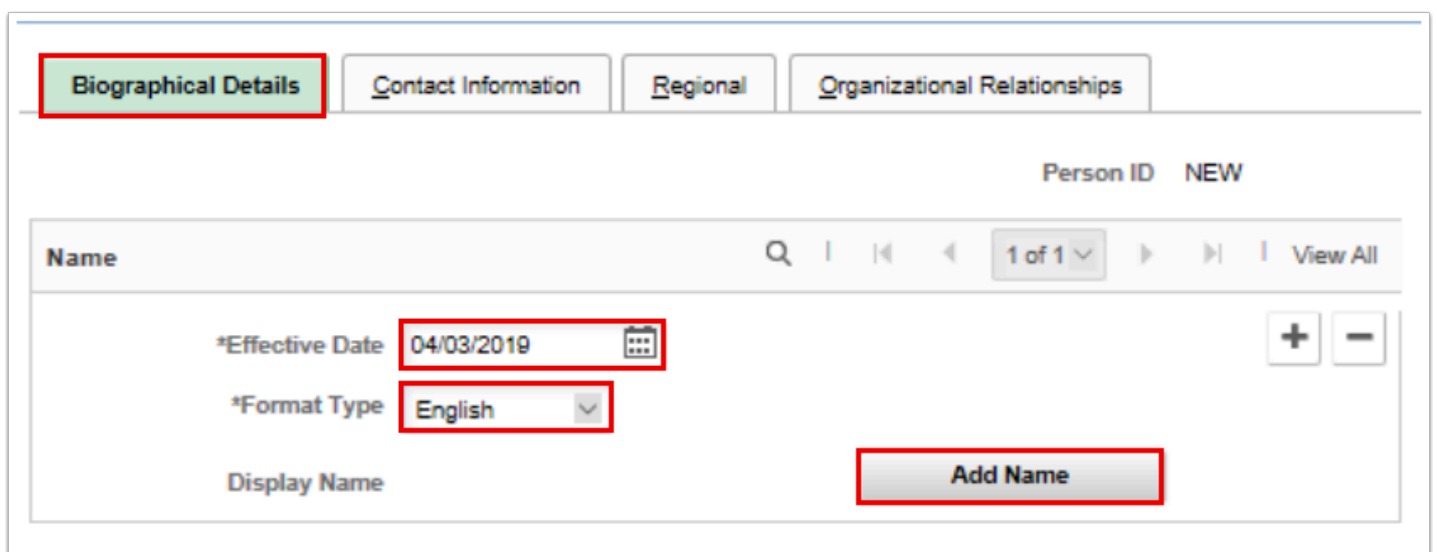
Add a Person

Person ID

Add Person

[Search for Matching Persons](#)

5. The Modify a Person page displays.
6. On the Biographical Details tab, the **Effective Date** will default to **Today's Date**, change if applicable. (This is the date the person will now exist in ctcLink, or if there is a Job or Institute assigned to the person here).
7. Select the **Format Type** from the drop-down menu and select **English**.
8. Select the **Add Name** button.



Biographical Details | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

Person ID NEW

Name | | | |

*Effective Date

*Format Type

Display Name

9. The Name pagelet displays.
10. Then select the **First Name** field and enter appropriate values.
11. Enter appropriate value in the **Last Name** field.
12. Select the **Refresh Name** button.
13. Select **OK**.

The screenshot shows a 'Name' dialog box with a title bar and a close button. Inside, there's a 'Help' link and a section titled 'English Name Format'. This section contains several input fields: 'Name Prefix' (a dropdown), '*First Name' (text input with 'Mary'), 'Middle Name' (text input), '*Last Name' (text input with 'Poppins'), 'Name Suffix' (a dropdown), 'Display Name' (text input with 'Mary Poppins'), 'Formal Name' (text input with 'Mary Poppins'), and 'Name' (text input with 'Poppins, Mary'). At the bottom, there are three buttons: 'OK', 'Cancel', and 'Refresh Name'. The 'Refresh Name' button is highlighted with a red box.

14. The Biographical Details tab displays with name.
15. In the **Biographic Information** section, select the **Date of Birth** field and enter the appropriate information.
16. **NOTE:** Leave the **Birth State** and **Birth Location** fields blank.
17. **Birth Country** auto populates to USA.

The screenshot shows the 'Biographic Information' section. It contains several fields: 'Date of Birth' (text input with '04/01/1978' and a calendar icon, highlighted with a red box), 'Birth Country' (text input with 'USA' and a search icon), 'Birth State' (text input with a search icon), and 'Birth Location' (text input). To the right of these fields, there are labels for 'Years' (41) and 'Months' (0). At the bottom right, there is a checkbox labeled 'Waive Data Protection' which is unchecked.

18. In the **Biographical History** section, **Gender and Orientation Details** subsection, change the default value of the **Legal Sex** field from the default *Unknown* to the employee's Legal Sex.

Biographical History

*Effective Date: 03/09/2023

Legal Definition of Sex ?

Gender and Orientation Details

Regulatory Region: USA United States

*Legal Sex: Unknown

*Highest Education Level: Not Indicated

*Marital Status: Unknown

Language Code:

Alternate ID:

☐ Full-Time Student

As of:

Help - Legal Definition of Sex

Legal Definition of Sex

Please enter the legal sex as denoted on this person's birth certificate or driver's license per WAC 246-490-075 or WAC 308-104-0150.

Example when No SOGI role is assigned. Only Legal Sex field is displayed

NOTE: If a user has the **ZD HCM SOGI** role and one of roles listed at the top of the QRG to *Add/Update*, then they will see a different layout on this page which displays the Pronoun and SOGI fields, as seen below.

Gender and Orientation Details

Regulatory Region: USA United States

*Legal Sex: Male

Pronoun:

Sexual Orientation:

Gender Identity:

Pronoun and SOGI fields are displayed and can be added and updated

19. In the **National ID** section, select Social Security Number for the the **National ID Type**.
20. Enter the Social Security number into the **National ID** field.

National ID

1-1 of 1 | View All

*Country	*National ID Type	National ID	Primary ID			
USA	Social Security Number		<input checked="" type="checkbox"/>	+	-	

21. Select the **Contact Information** tab.
22. The Contact Information page displays.
23. In the Current Addresses section, select the **Add Address Detail** link.

Biographical Details **Contact Information** Regional Organizational Relationships

Mary Poppins Empl ID NEW

Current Addresses

1-1 of 1 | View All

Address Type	As Of Date	Status	Address			
Home	04/03/2019	A		Add Address Detail	+	-

24. The Address History pagelet displays.
25. Select the **Add Address** link.

Address History

Address Type Home

Address History 1 of 1

*Effective Date 04/03/2019 Address + -

Country USA

*Status A

Add Address

OK Cancel Refresh

26. The Edit Address pagelet displays.
27. Enter the **Street Address** on **Address Line 1** (if there is a PO Box, you can enter it on Address Line 2).
28. Enter the **City**.
29. Enter the **State**.
30. Enter the **Postal (Zip) code**.
31. The County should auto-populate based on your address.
32. If the system does not recognize the address it will list potential alternatives. Select the **Override Address Verification** box to bypass.
33. Select the **OK** button.

The screenshot shows the 'Edit Address' form with the following fields and controls:

- Country:** A dropdown menu showing 'United States'.
- Address 1:** A text input field.
- Address 2:** A text input field.
- Address 3:** A text input field.
- City:** A text input field.
- State:** A text input field.
- Postal:** A text input field.
- County:** A text input field.
- Buttons:** 'OK' and 'Cancel' buttons.
- Clear:** A blue link.
- Override Address Verification:** A checkbox.

Red boxes highlight the 'OK' button, 'Address 1', 'City', 'State', 'Postal', and 'Override Address Verification' checkbox.

34. The Address History page displays with updated information.
35. Select the **OK** button.

Address History

Address Type Home

Address History



1 of 1

*Effective Date 04/03/2019

Country USA

*Status A

[Add Address](#)

Address 100 Disney Court .
Orlando, FL 34567



OK

Cancel

Refresh

36. The Contact Information tab displays.
37. In the **Phone Information** section, enter the details regarding the phone details.
 - a. Select the **Phone Type** from the drop-down menu.
 - b. Enter the **Telephone** number.
 - c. Enter an **Extension** (optional).
 - d. Select the **Preferred** check box.

Phone Information



1-1 of 1



View All

*Phone Type	Telephone	Extension	Preferred		
Business	123/456-0789	1000	<input checked="" type="checkbox"/>	+	-

38. In the **Email Address** section, enter the details regarding the email account.
 - a. Select the **Email Type** from the drop-down menu.
 - b. Enter the **Email Address**.
 - c. Select the **Preferred** check box.

Email Addresses

1-1 of 1 | View All

*Email Type	*Email Address	Preferred		
Business	mpoppins@sbctc.edu	<input checked="" type="checkbox"/>	+	-

! IMPORTANT:

- In order for new employees to receive email notifications through ctcLink (a vital part of the absence management process, etc.) their Primary Email Address needs to be set up in the **User Profile** area of PeopleSoft. **You will not have access to this area.**
- However, you must add this Primary email address in the biographical area in addition to any other email addresses you may include. It does not need to be checked as Preferred but should be entered as **Campus**. Contact your Local Security Administrators at your college for this address.
- This is important as the **Primary** email address (e.g. Bsanderson@sbctc.edu) drives **Workflow** and is located in the **User Profile** (security) area.
- Local Security Administrators** may or may not have the ability to update the **User Profile** in PeopleSoft, however they will be able to tell you what the Primary email address will be.
- Since the **User Profile** is automatically generated each night and is updated based on who was hired earlier that day, best practice is to add the employee record in HCM on the same day as the **Primary email address** is entered in the **User Profile** area.
- If it is not entered on the same day, and your Local Security Administrator does not have access to this area, they will have to log a Service Ticket and the State Board (SBCTC) ERP Support staff will update the User Profile. If they do have access, they can update the User Profile for you after the fact.
- To efficiently set up the primary email address both in the **User Profile** and in the **Biographical** areas, your college should develop and communicate an internal business process that will ensure that this setup is not missed when you on-board an employee.

39. Select the **Regional** tab.
40. The Regional page displays.
41. Select an **Ethnic Group** from the lookup icon.
42. Select the **Primary** checkbox.
43. In the **Veterans** section, select a **Military Status** from the drop-down menu.
44. If you select a **discharge** related option, the system will require the **Military Discharge Date**.

45. The option selected in **Smoker History** gets displayed on the Additional Information page in Employee Self Service (ESS > Personal Details > Additional Information).
46. Select the **Organizational Relationships** tab.

The screenshot displays the 'Additional Information' page for Mary Popline. The 'Regional' tab is active. The 'Ethnic Group' section shows 'Regulatory Region' as 'USA' and 'Ethnic Group' as 'WHITE'. The 'History' section includes fields for 'Effective Date', 'Date Entitled to Medicare', 'Citizenship (Proof 1)', and 'Citizenship (Proof 2)'. The 'Veteran' section has a 'Military Status' dropdown. The 'Smoker History' section shows a table with one entry for 'Smoker'.

*Smoker	*As of
1	

47. The Organizational Relationships page displays.
48. Select the **Select Checklist Code** list.
49. Select **Person of Interest**.
50. Select **Add Person of Interest**.
51. Select **Add Relationship** button.

Biographical Details | Contact Information | Regional | **Organizational Relationships**

Mary Poppine Person ID NEW

Choose Org Relationship to Add

☐ Employee
☐ Contingent Worker
☒ **Person of Interest**

Empl Record 0

Select Checklist Code **Add Person of Interest Inst.**

Add Relationship

Save Notify Refresh Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | Organizational Relationships

52. The Job Data page displays.

53. On the **Work Location** tab, in the **Work Location Details** section, notice the *Add Person of Interest* is populated in the **Action** field.

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

Mary Poppine Empl ID 101012902
Person of Interest Empl Record 0 Person of Interest

Work Location Details

*Effective Date 04/03/2019 Effective Sequence 0 *Action **Add Person of Interest**
HR Status Active Reason
Job Status Active *Job Indicator Primary Job

Calculate Status and Dates

Position Number Override Position Data
Position Entry Date
☐ Position Management Record
*Regulatory Region USA United States
*Company
*Business Unit HR170 Community Colleges of Spokane
*Department
Department Entry Date
*Location
Establishment ID Date Created 04/03/2019
Last Start Date 04/03/2019
Expected Job End Date

54. You have successfully added a POI/Volunteer to Biographical Details.

! **IMPORTANT:** If employee information has been entered and saved before adding job data, you may search using the **Add Employment Instance** page. (Navigation: NavBar > Navigator > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance).

Adding a Job Instance

! You must have at least one of these local college managed security roles:

- ZC HR Employee Maintenance
- ZD Benefits Employee Data Inq
- ZD HR Admin View Job Data
- ZD HR Central Config VW
- ZD HR Employee Maintenance VW
- ZD HR Limited Person Job Info
- ZZ FWL HCM Pay Process
- ZZ HR Employee Maintenance
- ZZ SS Workforce Administrator

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Workforce Administration > Job Information > Job Data

1. The Job Data search page displays.
2. Enter Search Criteria and select the **Search** button.
3. The Job Data page displays.
4. In the **Work Location** tab, select **Add Person of Interest** from the **Action** drop-down menu.
5. Select **Reason** code from drop-down menu.
6. Enter **Not Applicable** under **Job Indicator** look icon.
7. Select or enter the **Establishment ID**.
8. Select the **Job Information** tab.

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

Mary Poppine
Person of Interest

Empl ID 101012902
Empl Record 0 Person of Interest

Work Location Details ?

*Effective Date 04/03/2019 Go To Row + -

Effective Sequence 0

HR Status Active

Job Status Active

Calculate Status and Dates

*Action Add Person of Interest

Reason Internship

*Job Indicator Not Applicable

Position Number Current

Override Position Data

Position Entry Date

☐ Position Management Record

*Regulatory Region USA United States

*Company

*Business Unit HR170 Community Colleges of Spokane

*Department

Department Entry Date

*Location

Establishment ID

Date Created 04/03/2019

9. The Job Information page displays.
10. Select the **Supervisor ID** lookup icon to select the supervisor for the new hire.
11. Select the **Empl Class** drop-down menu and select the appropriate classification for the **POI**.
12. Select the **Payroll** tab.

Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Mary Poppine
Person of Interest

Empl ID 101012902
Empl Record 0 Person of Interest

Job Information Details ?

Effective Date 04/03/2019 Go To Row

Effective Sequence 0

HR Status Active

Job Status Active

Action Add Person of Interest

Reason Internship

Job Indicator Not Applicable

Current

*Job Code

Entry Date

Supervisor Level

Supervisor ID

Reports To

*Regular/Temporary Regular

*Full/Part Full-Time

Empl Class

*Officer Code None

*Regular Shift Not Applicable

Shift Rate

Shift Factor

13. The Payroll page displays.

14. Change the default of **Payroll for North America** to **Other** for Payroll system.

! IMPORTANT: For Volunteer/Person of Interest (POI) type employees, you **MUST** select the Payroll System of **Other** from the drop-down selection. This will cause the pay group field to be blank and prevent the employee data from pushing to Payroll.

The screenshot shows the 'Payroll' tab for an employee named Mary Poppins (Empl ID 101012902). The 'Payroll System' dropdown is set to 'Other'. The 'Other Payroll System' section contains the following fields:

Field	Value
Effective Date	04/03/2019
Effective Sequence	0
HR Status	Active
Job Status	Active
Action	Add Person of Interest
Reason	Internship
Job Indicator	Not Applicable
*Payroll System	Other
Pay Group	
Pay Type	
Tax Location Code	
GL Pay Type	
Combination Code	
Holiday Schedule	
*Tipped	
FICA Status	Subject

15. The process to add a new employee as a person of interest is now complete.

16. End of procedure.