

### **What is a POI (Person of Interest)?**

A POI is a non-employee individual who needs access to UH systems or affiliation. Examples include visiting faculty, future employees, contractors, and consultants.

### **When should I use the POI form?**

Use the POI form to:

- Grant limited access to UH systems/resources
- Establish affiliation without hiring
- Onboard non-paid individuals with defined roles

### **Can POI access be extended?**

Yes, the end date can be updated within the allowed duration for the selected POI type by creating a new POI form.

### **Can the POI Type be changed after submission?**

No. You must inactivate the existing POI and create a new one with the correct type.

### **How do I terminate or deactivate a POI?**

Use the **Inactivate** option, which is available only to users with the initiator role and access to the sponsor's department. Only active POIs can be inactivated.

### **Who can initiate a POI form?**

Only users with the **Initiator Role** can initiate a POI form. This includes HR, DBA, and other designated personnel depending on campus and POI type.

### **What information is required to add a POI?**

You must provide:

- First Name, Last Name, Date of birth
- POI Type, Start Date, Sponsor ID
- Contact Information (address, phone, email)
- Identification Information (DOB, Gender, SSN or other ID)
- POI-Sponsor Form

### **Is SSN Mandatory for all POI types?**

No. SSN is mandatory only for:

- Temps
- NonPd ROTC
- OCP – Non Affiliated College Employee
- Retiree
- Former Employee
- NonPd Fac LCC Instructors

## How do I know if someone already has a POI or job record?

Use the search screen in PeopleSoft. Icons indicate:

- Green in **Job** column = Job data exists
- Green in **Act** column = Active job
- Green in **POI** column = Active POI

## What happens after submitting a POI form?

- The form enters a workflow for approval
- You can track status via the **Form History** and **Transaction Log**
- System access (email, ID, etc.) is granted upon approval

## Can I attach documents to the POI form?

Yes. Use the **Add Document** option in the Submit Form tab and select a description from the dropdown. You cannot attach a document once the ePOI has been executed.

## What does the Hold option do?

It allows the initiator to pause form submission. The form can later be submitted via the **Resubmit an eFORM** page.

## Who can push back a POI form?

Only HR can push back a form to the Department Business Administrator (DBA). The DBA cannot push it back to the initiator.

## Can I view previously submitted POI forms?

Yes. Use the **View an eFORM** page to search by eFORM ID, employee info, department, or status.

## What are common mistakes to avoid?

- Creating duplicate entries
- Selecting incorrect POI type
- Entering invalid SSN or DOB
- Providing incorrect contact info
- Missing system access flags

## What determines the POI's access and workflow?

The **POI Type** determines:

- System access (e.g., PeopleSoft, Campus Card, Library, Parking)
- Approval workflow
- Auto-generated end date

## Can I override auto-populated contact info?

Yes. Initiators can update or override address, phone, and email fields that are auto filled from existing POI records.