



# PeopleSoft Training – Person of Interest (POI) Form

University of Houston Systems  
Department Admin Training (End  
Users)

# What is a Person of Interest (POI)?

- A POI is a non-employee individual who needs system access or affiliation.
- Examples include:
  - - Visiting Faculty
  - - Future Employees
  - - Contractors
  - - Consultants

# When to Use the POI Form

- To grant limited access to University systems or resources.
- To establish affiliation without hiring.
- For onboarding non-paid individuals with defined roles.

# Roles

## UH Main Campus Roles used in POI

- **UHM\_HC\_INITIATOR** - Role to initiate all eForms for UH Main
- **UHM\_HC\_DEPARTMENT** -Department Business Administrator
- **UHM\_HC\_FAC\_AFF\_ANALYST**- Role assigned to Faculty Affairs personnel for verification and approval of faculty eForms.
- **UHM\_HC\_HR\_DEPT** - Role assigned to HR personnel that approve eForms.
- **UHM\_HC\_HR\_EMPLOYMENT** This role is assigned to HR Employment personnel that approve ePOIs and eI-9s for UH Main.
- **UHM\_HC\_POI\_LCC\_DEPT** Role assigned to ePOI initiators.

## UH Clear Lake Campus Roles used in POI

- **UHC\_HC\_INITIATOR**- Role to initiate all eForms for UH Clear Lake.
- **UHC\_HC\_HR\_DIRECTOR** - UHCL role
- **UHC\_HC\_HR\_EMPLOYEMENT**- This role is assigned to HR Employment personnel that approve ePOIs and eI-9s for UH Clear Lake.

## UH Downtown Campus Roles used in POI

- **UHD\_HC\_INITIATOR**- Role to initiate all eForms for UH Downtown
- **UHD\_HC\_COLLEGE**- College Level approver
- **UHD\_HC\_HR\_EMPLOYEMENT**- This role is assigned to HR Employment personnel that approve ePOIs and eI-9s for UH Downtown.

# POI Types

POI Type	Definition	Duration
00100 - Auditors	State auditors may require view access to PeopleSoft, CougarNet, Outlook, UH facilities.	6 Months
00101 - Consultants	Consultants used to assist technical and functional communities.	6 Months
00103 - Guests	Includes employee spouse. Guests may need card access to UH and UHD services and facilities.	90 Days
00105 - Temps	Includes Honorary Instructors, LCC faculty, and ROTC faculty who are not employees	6 Months
00106 - Future Faculty Employees	Future employees who can be entered early before paperwork arrives with job info.	6 Months
00111 – Future Faculty Employees -HR	Future faculty employees who can be entered early before paperwork arrives with job info.	6 Months
00109 - DOR Guest	Used for DOR where guests need access for up to 3 years.	3 Years
00220 - NonPd ROTC	Non-paid ROTC faculty who are not UHS employees.	6 Months
00300 - OCP-Nonaffiliated College Emp	Other campus personnel -- Employees for colleges other than UHS.	6 Months
00310 - OCP-Off Campus Vendors	Other Campus Personnel -- Off Campus Vendors.	90 Days
00320 - OCP-On Campus Vendors	Other Campus Personnel -- On Campus Vendors.	90 Days
00330 - OCP-Religion Center	Other Campus Personnel -- Religion Center staff.	6 Months
00340 - OCP-Volunteers	Other Campus Personnel -- Volunteers.	90 Days
00350 - Campus Program Workers	Used for individuals who will have contact with minors at certain campus programs. These individuals must complete the Campus Program for Minor training.	6 Months
00400 - Other Students - Non UHS	Other Students not in UHS Systems.	6 Months
00410 - Other Students - UHD Students	Other Students - UHD Students not in PeopleSoft.	1 Year
00500 - Retirees	Retirees.	1 Year
00550 - Former Employee	Former Employee.	1 Year

# Navigation Path in PeopleSoft

Main Menu → **UHS HRMS EFORMS** → UHS eForms Home Page →

- Start a New form
- Resubmit an eForm
- Evaluate an eForm
- View an eForm
- View a GT eForm
- eForm Training Resources and Tools

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## Human Resources Electronic Forms (eForms)



### [Start a New eForm](#)

Start a new eForm, which will then be routed to the appropriate approvers.



### [Resubmit an eForm](#)

Make changes to an eForm that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.



### [Evaluate an eForm](#)

Participate in the approval process for an eForm. This link allows you to search for the eForm you want to evaluate.



### [View a UHS eForm](#)

View a recently submitted UHS eForm, including workflow history and form status. eForms submitted in the last month are listed here. This is a read-only view.



### [View a GT eForm](#)

View a GT eForm, including workflow history and form status. This is a read-only view.



### [eForm Training Resources and Tools](#)

eForms Training Resources and Tools link.

# Step 1 – Search for Existing Record

## Navigate to Search Screen

- Go to: Main Menu → UHS HRMS EFORMS → UHS eForms Home Page → Start a New Form

## Perform a Search

- Search using **one or more** of the following:
  - Employee ID
  - First Name
  - Last Name
  - Date of Birth
  - National ID






Search result will display all the employees based on information entered in search fields.

◆ **Note:** You **must enter 3 items** listed below to see the **ADD** button.

- **First Name**
- **Last Name**
- **Date of Birth**

# Search Result

## Interpreting Icons and Indicators

- **Job Column:**
  -  **Green** → Person has **Job Data** (active or inactive)
- **Act Column:**
  -  **Green** → Person has an **Active Job**
- **POI Column:**
  -  **Green** → Person has an **Active POI**
- **Job Info Column:**  **Icon**
  - Click to view **all job data records** (even non-active)
  -  If a person has **multiple jobs**, only the **Active and Primary Job** will show in the results list.

Job Information	
Empl Rcd Nbr:	0
Payroll Status:	Retired
Business Unit:	HR730
Department:	H0182 Human Resources
Empl Class:	Support Staff
Regular/Temporary:	Regular
Position Number:	00013146
Job Code:	D313 Spec, Employee Services 1
Original FTE:	1.00

[Return](#)

## Add a Person of Interest(POI)

### POI Search

Search below for the person of interest you wish to enter. If you know the EmplID, enter it, and click Search. Otherwise, enter the First Name, Last Name, and Date of Birth information you have and click Search. If your search(es) does not return any results, enter the POI's first name, last name, and date of birth, and click Search. The Add button will display. Click Add to create a new EmplID.

#### Search Fields

Empl ID:

\*First Name:

Middle Name:

\*Last Name:

\*Date of Birth:












Social Security #:

Gender:

Clear

Search

#### Job Results

	Add	Job Info	Job	Act	POI	Empl ID	Name	Preferred Name	Gender	Date of Birth	National ID
1	<a href="#">Add</a>					0088353	Mouse,Micky A	Mouse,Micky	Female	01/02	*****7205
2	<a href="#">Add</a>					0407789	Mouse,Micky C	Mouse,Micky	Female	05/12	*****7502
3	<a href="#">Add</a>					0660474	Mouse,Micky Yvette	Mouse,Micky	Female	03/27	*****2874

# Search Result

## Use Employee ID from Results

- Copy the **Employee ID** from the search result.
- Paste it into the **top search field** to enable:
  - **+** “ADD” option
  - **X** “Inactivate” option

## Review Search Results

- **Job Result** (for existing employees)
- **POI Result** (for persons with an existing POI record)

**Search Fields**

Empl ID:

\*First Name:  Middle Name:

\*Last Name:  \*Date of Birth:

Social Security #:  Gender:

Job Results											
Personalize   Find       First 1 of 1 Last											
	Add	Job Info	Job	Act	POI	Empl ID	Name	Preferred Name	Gender	Date of Birth	National ID
1	<input type="button" value="Add"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0407789	Mouse,Micky C	Mouse,Micky	Female	05/12	*****7502

Active POI Results												
Personalize   Find   View All       First 1 of 1 Last												
	Inactivate	Empl ID	POI Type	Description	Start Date	End Date	Name	Sponsor Id	Sponsor Name	Bus Unit	Sponsor's Dept Id	Sponsor's Dept Name
1	<input type="button" value="Inactivate"/>	0407789	00106	Future Faculty Employees	03/03/2025	03/03/2026	Mouse,Micky C			HR730	H0086	English

# Step 1 – Add Person of Interest

## Relationship Information

### Select POI Type

- Choose the appropriate **POI Type** from the predefined list.
  - **Examples:** *Consultant, Future Employee*, etc.
- The **POI Type** determines:
  - **Control Access**
  - **Approval workflow**
  - **Auto-generated end date**

### Enter Start Date

- The start date can be:
  - **Up to 1 day in the past**
  - **Up to 60 days in the future**
- The system **auto-populates the End Date** based on the POI Type. Initiator can update end date but it should be within expiry date.

### Enter Sponsor ID

- Enter the **Sponsor ID**
- Sponsor should be from the **same department** and in some cases, must have **incumbent reporting** to them.
- The system will display the:
  - **Sponsor's Name**
  - **Sponsor's Department id and name**

Based on the **selected POI Type**, the system displays: **POI Control Access**

- The **POI Control Access** section displays specific access areas but not limited to below list:
  - **PS Access**
  - **Campus Card**
  - **Library**
  - **Parking**
  - **WebCT Academic (Blackboard Access)**

**Note** - Only initiator has access to update the fields in Relationship Information tab

The screenshot shows the Oracle HRMS EForms interface for adding a Person of Interest (POI). The page title is "Add A POI Form" and the current step is "Step 1 of 4: POI Relationship". The breadcrumb navigation shows "UHS HRMS EFORMS > UHS eForms Home Page". The Oracle logo is visible at the top. The main navigation tabs are "Relationship Information", "Contact Information", "Identification Information", and "Submit Form". The "Relationship Information" tab is active. The form content includes:

- Personal Info:** Name: Modi, Harshit A; Empl ID: [Redacted]
- POI Relationship:**
  - \*POI Type: Consultants (dropdown)
  - \*Start Date: 04/25/2025 (calendar icon)
  - \*End Date: 04/25/2026 (calendar icon)
  - \*Sponsor Empl ID: 8021492 (magnifying glass icon)
  - Sponsor Name: Renu Singhania
  - Sponsor Dept: H0182 Human Resources
  - eForm ID: 38
  - Form Action: Add
- POI Control Access:**
  - PS Access
  - Campus Card
  - Library
  - Parking
  - WebCT Academic (Blackboard Access)

At the bottom right, there is a search button labeled "<< Search".

# Step 2 – Add Person of Interest

## Contact Information

Fields with \* are required.

### Update Address Information

- All **required address fields** must be completed.
- The **type of address required** is determined by the **POI Type** selection.

### Update Phone Information

- All **required phone fields** must be completed.
- The **type of phone required** is based on the **POI Type**.
- Select **Preferred** phone type if you have any.

### Update Email Address

- All **required email fields** must be completed.
- Ensure the **email address is valid and correct**.
- The **type of email required** is determined by the **POI Type**.

### Auto-Population from Existing POI

- If an **existing POI** is selected to create a **new POI**, the **contact information (address, phone, email)** will be **auto-populated** from the existing record.
- Initiators have the option to **update or override** the auto-filled information as needed.

The screenshot shows the Oracle HRMS EForms interface for adding a Person of Interest (POI). The page is titled "Add A POI Form" and is at "Step 2 of 4: POI Contact Information". The user is prompted to "Enter the contact information for the person of interest(POI)".

The interface is divided into several sections:

- Personal Info:** eForm ID: 38; First Name: Harshit; Middle Name: A; Last Name: Modi; Name Suffix: (empty).
- Address Information:** \*Address Type: Home\* (dropdown); Country: United States; \*Address: 4367 Cougar village drive, Bldg 525; \*City: Houston; \*State: TX (dropdown with search icon); \*Postal Code: 77004.
- Phone Information:** \*Phone Type: Home\* (dropdown); \*Phone Number: (input field); Preferred: (checkbox).
- Email Address:** \*Email Type: Home\* (dropdown); \*Email Address: (input field).

Each section has a "Find | View All" link and a "First 1 of 1 Last" pagination indicator. There are also "+" and "-" icons for expanding/collapsing sections.



# Step 4 – Add Person of Interest

## Submit Form

### Acknowledge the Form Messages

- Check the **acknowledgment checkbox** to confirm the review of entered information.

### Add Comments

- Everyone in the workflow must enter comments in the **Comments** section for all actions like submit, deny, push back.

### Attach Supporting Documents

- The **Initiator** can attach documents by:
  - Clicking **“Add Document”**
  - Selecting the **Description dropdown**
- ♦ Note -Completed and signed POI sponsor form is mandatory in order for Human resources to approve the POI form.

[POI Sponsor Form](#)

### Choose Submission Option

- The **Initiator** has two options:
  - **Submit** – Sends the form to the next approver in the workflow
  - **Hold** – Form is put on hold and user can submit it later through **Resubmit an eForm** page.
- ♦ Note -Always check for missing or incorrect data before submitting.

The screenshot shows the Oracle HRMS EForms interface for 'Add A POI Form'. The breadcrumb trail is 'UHS HRMS EFORMS > UHS eForms Home Page'. The Oracle logo is in the top left. The navigation tabs are 'Relationship Information', 'Contact Information', 'Identification Information', and 'Submit Form'. The page title is 'Add A POI Form' and the sub-header is 'Step 4 of 4: Finalize Form'. A note says 'Enter any relevant information requested where indicated and/or comments in the Your Comment field to be included this form.' The 'Personal Info' section has a 'Name' field and an 'Empl ID: NEW' label. The 'Form Messages' section contains a table with one message: 'POI Type selected requires explanation for processing.' with a description 'Submit explanation in Comments Section.' and an information icon. The 'Attachments' section has a '\*Description' dropdown, 'Add Document' and 'Refresh' buttons, and a table with columns 'View', 'Description', 'File size', 'Author', and 'Created Date/Time'. The table has one row: '1 View Miscellaneous 8021492 05/12/2025 3:07:34PM'. The 'Comments' section has a 'Your Comment:' text area with the text 'This is test POI form.' and a 'Comment History:' text area. At the bottom right, there are 'Hold' and 'Submit' buttons.

Relationship Information | Contact Information | Identification Information | **Submit Form**

### Add A POI Form

Step 4 of 4: Finalize Form

Enter any relevant information requested where indicated and/or comments in the Your Comment field to be included this form.

**Personal Info**

Name:  Empl ID: NEW

**Form Messages**

	Message Text	Description	
<input checked="" type="checkbox"/>	POI Type selected requires explanation for processing.	Submit explanation in Comments Section.	

**Attachments**

\*Description

	View	Description	File size	Author	Created Date/Time	
1	<input type="button" value="View"/>	Miscellaneous		8021492	05/12/2025 3:07:34PM	<input type="button" value="-"/>

**Comments**

Your Comment:

Comment History:

# Step 5 – Add Person of Interest

## Form Result

- **View This Form:** Click this link to review the completed form.
- The **Form History** tab appears after form submission and is used for tracking.
- **Transaction Log:** Displays a detailed audit trail of the form, including:
  - Status changes (e.g., Submitted, On Hold, Resubmitted).
  - Timestamps for each change.
  - User IDs & Name of individuals who made updates.
- **"Who Can Work On This Form?" Link:**
  - Click this link to view a list of authorized users who have access to act on the form.
  - Useful for checking who is next person in workflow.
- **Go To eForm Home Page:** Returns you to the main eForms dashboard for further actions.

Favorites ▾ Main Menu ▾ > UHS HRMS EFORMS ▾ > UHS eForms Home Page

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Contact Information Identification Information Submit Form **Form Result**

### Add A POI Form

#### Form Result

You have entered all the information for the POI.

#### Personal Info

Name:	Goyal, Riya	Empl ID:	NEW
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#### Form Status

eForm ID: 40

You have just PLACED ON HOLD this form. If you need to come back to this form, please go to Update/Resubmit the form.


[View This Form](#)

[Go To eForm Home Page](#)

# POI Form Actions

- **Push Back**

**This action routes the form back to the previous approver role—not to the original initiator.**

 *Only HR has access to push back a form to the DBA. The DBA cannot push the form back to the initiator.*

- **Add -Employees can:**

- Create or initiate a new POI form.
- Add a new POI for existing
- Inactivate an existing POI.

- **Deny**

Staff can withdraw a POI form if it's no longer needed or was submitted in error.

- **Evaluate**

This action allows staff to review and approve a POI form during the workflow process.

- **Hold**

Staff may place the form on hold before submitting it for the next level of approval.

- **Update**

Staff can edit or modify the fields and data within a POI form prior to final submission.

- **Recycle**

HR and DBA can recycle the POI form back to initiator.

## **Important Role-Based Notes**

- All **DBA** users must have the **Initiator role** in order to create or initiate a POI form.

# UH Main Workflow

## UHM Workflow #1

Employee with these roles can process all types of POI **except** dependent of international student, J-1 research scholars, other students – LCC student, LCC applicant, NonPd Fac LCC instructor

Step 1- **Initiator** (Role-UHM\_HC\_INITIATOR)

Add/Update/Hold/ Deny

Step 2- **Department Business Admin** (Role- UHM\_HC\_DEPARTMENT)

Add/ Evaluate/ Update/ Hold/ Deny

Step 3- **Human Resources** (Role- UHM\_HC\_HR\_DEPT)

Add/ Evaluate/ Update/ Hold/ Deny/ Push Back

## UHM Workflow #2

Employee with this role can initiate Future faculty Employees POI type

Step 1- **Faculty Affairs Analyst** (Role- UHM\_HC\_FAC\_AFF\_ANALYST)

Add/Update/Hold/ Withdraw

Step 2- **Human Resources** (Role-UHM\_HC\_HR\_DEPT)

Add/ Evaluate/ Update/ Hold/ Deny

# UH Main Workflow

## UHM Workflow #3

Employee with this role can initiate and evaluate Dependents of Intl Students and J-1 Research Scholars POI type

Step 1- **International Studies** (Role- UHM\_HC\_POI\_INTL\_DEPENDENT)

Add/Update/Hold/Evaluate /Deny

## UHM Workflow #4

Employee with this role can initiate and evaluate Non-Paid Faculty LCC Instructors, Other Students - LCC Applicant, Other Students - LCC Student POI type.

Step 1- **Language and Cultural Center** (Role-UHM\_HC\_POI\_LCC\_DEPT)

Add/Update/Hold/Evaluate/Deny

## UHM Workflow #5

This role can initiate and approve Future employee- HR

Step 1- **Human Resource Employee** (Role- UHM\_HC\_HR\_EMPLOYMENT)

Add/Update/Hold/Evaluate/Deny

# UH Downtown Workflow

## UHD Workflow #1

Step 1- **Initiator** (Role-UHD\_HC\_INITIATOR).

Add/Update/Hold/ Deny

POI Type- Auditors, Guests, Consultants, Future Employees, Temps, Future Faculty Employees, OCP- Nonaffiliated College Emp, Campus Program Worker, Other Student –UHD Students, Former Employee, OCP-Off campus Vendors, OCP-on campus Vendors, OCP-Volunteers

Step 2- **College Business Admin** (Role- UHD\_HC\_COLLEGE)

Add/ Evaluate/ Update/ Hold/ Deny

Step 3- **Human Resources** (Role- UHD\_HC\_HR\_EMPLOYMENT)

Add/ Evaluate/ Update/ Hold/ Deny/ Push Back

# UH Clear Lake Workflow

## UHCL Workflow #1

POI Type-Consultants, Future Employees, Temps, Future Faculty Employees, OCP- Nonaffiliated College Emp, Campus Program Worker, Other Student –UHCL Cont Edu, Retirees, Former Employee, Emeriti

Step 1- **Initiator** (Role-UHC\_HC\_INITIATOR).

Add/Update/Hold/ Deny

Step 2- **Department Business Admin** (Role- UHC\_HC\_DEPT)

Add/ Evaluate/ Update/ Hold/ Deny

Step 3- **Human Resources** (Role- UHC\_HC\_HR\_DIRECTOR)

Add/ Evaluate/ Update/ Hold/ Deny/Push Back

## UHCL Workflow #2

POI Type- Future Employee- HR

Step 1- **Human Resources** (Role-UHC\_HC\_HR\_EMPLOYMENT)

Add/Update/Hold/ Deny

# Inactivate POI

## Visibility of "Inactivate" Option:

- The "Inactivate" button is visible **based on the security access** of the logged-in user.
- Only department staff with **initiator role** will be able to inactivate the POI.
- Specifically, if the user has access to the **sponsor's department**, the "Inactivate" option will be visible.
- For example, if the sponsor's department is **Human Resources**, then any employee with access to **Human Resources** will be able to view and use the "Inactivate" option.
- Only Active POI records will be visible in POI result section. Future dated POI will not be visible.

**Search Fields**

Empl ID:  
0407789

\*First Name:  Middle Name:

\*Last Name:  \*Date of Birth:

Social Security #:  Gender:

**Job Results** Personalize | Find | |  First  Last

	Add	Job Info	Job	Act	POI	Empl ID	Name	Preferred Name	Gender	Date of Birth	National ID
1	<input type="button" value="Add"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0407789	Mouse, Micky C	Mouse, Micky	Female	05/12	*****7502

**Active POI Results** Personalize | Find | View All | |  First  Last

	Inactivate	Empl ID	POI Type	Description	Start Date	End Date	Name	Sponsor Id	Sponsor Name	Bus Unit	Sponsor's Dept Id	Sponsor's Dept Name
1	<input type="button" value="Inactivate"/>	0407789	00106	Future Faculty Employees	03/03/2025	03/03/2026	Mouse, Micky C			HR730	H0086	English

# Inactivate POI

## Inactivation Process:

Upon clicking "Inactivate":

- Only the **End Date** field is **editable**.
- All other information across different tabs becomes **read-only**.
- Users will have the ability to **attach documents** via the **Submit Form** tab.

## Workflow:

After submitting the inactivation, the request will be **routed to the next approver** in the workflow.

### Relationship Information

## Add A POI Form

### Step 1 of 4: POI Relationship

Enter the relationship information for the person of interest (POI).

### Personal Info

Name: Mouse, Micky C

Empl ID: 0407789

### POI Relationship

\*POI Type: Future Faculty Employees

eForm ID: 91

\*Start Date: 03/03/2025

Form Action: Inactivate

\*End Date:

\*Sponsor Empl ID: 1007522

Valeria Gonzalez

Dept: H0086

English

### POI Control Access

PS Access

Campus Card

Library

Parking

WebCT Academic (Blackboard Access)

<< Search

# View an eForm

## Purpose of This Page

- Used to search for existing eForms based on specific criteria.
- Helpful for reviewing status, history, and details of previously submitted forms and check who is next approver if form is in pending status.


## Key Search Criteria Fields


- **eForm ID** – Unique identifier of the form.
- **UHS Form Type** – Type of form (e.g., UHS\_POI).
- **Form Status** – Status such as *Pending*, *Withdrawn*, *On Hold*, *Executed* etc.
- **Employee Info** – Filter by *Empl ID*, *Name*, or *Last Name*.
- **Department** – Department code associated with the request.
- **Date Fields** – Narrow results using *Original Date* or *Last Date*.
- **Operator IDs** – Search by the user who originally submitted or last updated the form.

### Find an Existing Value

#### ▼ Search Criteria

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

Recent Searches  

Saved Searches  

---

eForm ID

UHS Form Type

Form Status


Empl ID

Name


Last Name

Department

Original Operator

Original Date   

Last Operator

Last Date   

[^ Show fewer options](#)

Case Sensitive

# View an eForm

## Search Features

- **Operators** like "begins with", "equals (=)" for flexible filtering.
- **Search:** Execute query to view results.
- **Clear:** Reset all search fields.
- **Save Search:** Save custom filters for repeated use.
- **Case Sensitive:** Toggle to match exact case.

## Understanding Search Results

- Displays matching records with:
  - eForm ID, Type, Status
  - Employee Info (Name, Empl ID)
  - Department, Operator info, Dates
- Click the **arrow icon ( > )** to open and view eForm details.
- Navigation links to move through result pages (First, Last, etc.).

## Tips

- Leave fields blank to retrieve **all available forms**.
- Use **partial names or IDs** with "begins with" for broader results.

## ▼ Search Results

47 results

View All   First ◀ 21-30 of 47 ▶ Last											
eForm ID	UHS Form Type	Form Status	Empl ID	Name	Last Name	Department	Original Operator	Original Date	Last Operator	Last Date	
37	UHS_POI	Pending	0040231	Tyler, Linda Sue	Tyler	D0006	0195969	05/14/2025	0195969	05/14/2025	>
40	UHS_POI	Withdrawn	NEW	Goyal, Riya	Goyal	H0182	0138464	05/14/2025	0138464	05/14/2025	>
54	UHS_POI	On Hold	NEW	Trek, Star	Trek	H0182	0080696	05/15/2025	0080696	05/15/2025	>

# Resubmit an eForm

- Initiator and department business admin can either withdraw the form which was put on hold or submit the form for next approver.
- Next approver will receive the email notification.
- Comments are mandatory for all actions.

The screenshot shows a web-based eForm interface for 'Update Person of Interest (POI)'. At the top, there are navigation tabs: 'Relationship Information', 'Contact Information', 'Identification Information', and 'Submit Form'. The main heading is 'Update Person of Interest (POI)' with a sub-heading 'Step 4 of 4: Finalize Form'. Below this, a instruction reads: 'Enter any relevant information requested where indicated and/or comments in the Your Comment field to be included this form.'

The form is divided into several sections:

- Personal Info:** A dark blue header. Below it, a light green box contains 'Name: Trek, Star' and 'Empl ID: NEW'.
- Form Messages:** A dark blue header. Below it, a table with a checkbox and a message: 'POI Type selected requires explanation for processing.' with an information icon.
- Attachments:** A dark blue header. Below it, a light green box contains a '\*Description' dropdown, an 'Add Document' button, and a 'Refresh' button. Below this is a table with columns: 'View', 'Description', 'File size', 'Author', and 'Created Date/Time'. The table has one row with a 'View' button and the date '05/22/2025 4:49:13PM'.
- Comments:** A dark blue header. Below it, a light green box contains a 'Your Comment:' text area and a 'Comment History:' text area.

At the bottom right, there are two buttons: 'Submit' and 'Withdraw'.

# Recycle an eForm

## Returning Forms to the Initiator (Recycle)

- **Definition:** Use **Recycle** when a form contains errors that require the original creator to make manual corrections.
- **Permissions:** Both **HR** and **Department Business Admins (DBA)** can perform this action via the *Evaluate POI* page.
- **The Process:**
  - Initiator receives an automated email notification.
  - Form is moved to the **Resubmit an eForm** page.
  - Initiator corrects the data and restarts the approval routing.

Relationship Information | Contact Information | Identification Info

### Evaluate Person of Interest (POI)

Step 3 of 3: Evaluate POI Identity Info

Please review the form fields below.

#### Personal Info

Name: \_\_\_\_\_ Empl ID: \_\_\_\_\_

#### Identity Information

\*Date of Birth:

\*Gender:

Social Security #:

Driver License State:

Driver's License #:

#### University System Account Access

**Username:** request to set up system credentials for access to university systems and campus-wide digital platforms. Note: This request does not include setup of an email account or Microsoft Suite license.

**Microsoft Suite License:** request to set up a university-issued email account and provide full access to Microsoft Office tools and related productivity applications.

#### Attachments

\*Description

View	Description	File size	Author	Created Date/Time
1 <input type="button" value="View"/>				04/23/2026 2:47:21PM

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# Push back an eForm

## Returning Forms to the DBA (Push Back)

- **Definition:** Use **Push Back** to return a form to the previous step in the chain for any correction.
- **Restricted Access:** This action is **exclusive to HR**.

## The Process:

- The form is sent back to the last approver (DBA) rather than the initiator.

## DBA Options:

1. Correct/Approve the form to send it back to HR.
2. Recycle the form if it further requires the initiator's input.

Relationship Information | Contact Information | Identification Info

### Evaluate Person of Interest (POI)

Step 3 of 3: Evaluate POI Identity Info

Please review the form fields below.

#### Personal Info

Name: [Redacted] Empl ID: [Redacted]

#### Identity Information

\*Date of Birth: [Redacted]

\*Gender: [Redacted]

Social Security #: [Redacted]

Driver License State: [Redacted]

Driver's License #: [Redacted]

#### University System Account Access

**Username:** request to set up system credentials for access to university systems and campus-wide digital platforms. Note: This request does not include setup of an email account or Microsoft Suite license.

**Microsoft Suite License:** request to set up a university-issued email account and provide full access to Microsoft Office tools and related productivity applications.

#### Attachments

\*Description

View	Description	File size	Author	Created Date/Time
1 <input type="button" value="View"/>	Miscellaneous		1007720	09/25/2025 10:19:59AM

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# Queries

- **HRMS\_AWE\_EPOI\_PEND\_DEPT** – This query prompts for Division ID, College ID, and Department ID. It returns POI forms that are in **Pending** or **Partially Approved** status.
- **HRMS\_AWE\_EPOI\_END\_DT** – This query prompts for Division ID, College ID, Department ID. It helps identify individuals whose POI status is ending in next 15 days or ended in last 15 days.
- **HRMS\_AWE\_EPOI\_END\_DT\_EMP**- This query prompts for employee ID to identify the end date of the POI.
- **HRMS\_POI\_CHECK\_STATUS**- This query display all the details by form status.

# Contact

For additional assistance or questions contact

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